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REPORT NO. 28

A Study
of
U.S. Visitors to Ontario

GAS STATION REPORT - 1967



Prepared By
Peter Klopchic, Ph.D.
Director Travel Research
ONTARIO DEPARTMENT OF TOURISM AND INFORMATION
Parliament Buildings, Toronto, Ontario

January, 1968

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Report of the Ontario Department of Tourism
and Recreation to the Ontario Legislature
on the Gas Station Survey.

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S U M M A R Y

- 33.3 per cent of all respondents were first-time visitors to Ontario, compared with 28.9 per cent first-time visitors in 1966.
- 72.3 per cent of first-time visitors were pleased and satisfied with their Ontario vacation; 2.8 per cent were not entirely satisfied, and approximately 17 per cent had not formed an opinion. The incidence of satisfaction would probably have been lower, except it is believed there is an underestimation in the United States regarding expectation of tourist attractions in Ontario. The Department's advertising and promotion should stress the fact that Ontario has many attractions and modern accommodation, as well as scenic beauty, providing for many kinds of vacations.
- 83.3 per cent of all respondents originated in the ten U.S. States which form our primary marketing area.
- 53 per cent of all respondents noticed Ontario advertisements - and 45 per cent were able to recall correctly, the name of the publication in which they appeared.
- The most striking single factor revealed was that almost half of first-time visitors came to Ontario en route to or from Expo; 20.6 per cent stating they visited the province en route to Expo and of these: 42.9% were first-time visitors, and 9.5% were repeat-visitors.

It is significant that a single event, well-publicized, was able to induce so many first-time visitors. Ontario's promotion of our large scale attractions, such as The Stratford Festival, Niagara Falls, Niagara-on-the-Lake, The Canadian National Exhibition, and our Capital City of Ottawa, should continue to be directed to potential first-time visitors.

- Approximately 47 per cent of respondents used hotels and motels for accommodation; 15 per cent used rented cottages or cabins, and 24 per cent used campsites. Others stayed with friends or relatives, or did not state the type of accommodation used, if any was required.
- Average length of stay in Ontario was 4.9 days, with no significant variation by origin or destination.
- Average age of all respondent head-of-parties was 41.3 years; of first-time visitors it was 38 years, and of repeat-visitors, it was 43 years.
- Average income of all respondent head-of-parties was \$10,210.
- Approximately 70 per cent of all respondent head-of-parties owned a 1965 or later model automobile.

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Purpose

At the request of the Deputy Minister, a survey of U.S. visitors to Ontario was made during the summer of 1967. In this particular instance, the method used was that of personal interview with operator-owners of U.S. licensed automobiles while they stopped for car servicing or gasoline purchases at selected Ontario gas stations.

This same type of survey was made during the summer of 1966 which resulted in a very limited number (232) of responses. However, as data obtained proved to be most useful to the Department in a number of ways, it was decided to continue the study in 1967. This year, 847 replies were obtained. These were analysed and the results recorded as follows.

The basic method could be called "accidental quota sample", and is described as follows:

1. Service stations at which the surveys were conducted represented those most widely known to Americans, i.e., Esso, Shell, B.A. and Texaco. They were alternated every sampling day, i.e., the first day at Esso stations, the second at Shell, the third at B.A., and the fourth at Texaco.
2. The days of the week were also rotated, i.e., on Monday the first week of July, Tuesday the second week, Wednesday the third week, and so on.
3. Interviewing was done between 2 and 6 p.m., as traffic is generally heaviest at this time.
4. The interviewer attempted to speak to all American drivers stopping at the service station where he was based that day, unless such large numbers were present at one time that he would have caused too lengthy a delay in their journey.
5. Regional locations were as follows, and were also rotated:

<u>Region</u>	<u>Survey Location</u>
<u>Arnprior</u>	(a) Cornwall (b) Kemptville (c) Smith Falls (d) Kingston (e) Service Centre for eastbound traffic at Odessa on 401
<u>Huntsville</u>	(a) Lakefield (b) Barrie (c) Huntsville
<u>London</u>	(a) Strathroy (b) Grand Bend (c) Thamesville (d) Leamington (e) Service Centre for eastbound traffic outside of Ingersoll on 401.
<u>North Bay</u>	(a) Blind River (b) Wawa
<u>Kenora</u>	(a) Fort William at Port Arthur (b) Atikokan
<u>Toronto</u>	(a) Port Colborne (b) Grimsby (c) Service Centre for westbound traffic between Newtonville and Newcastle on 401

Several tests were made on data obtained in order to determine the validity of an "Accidental Quota Sample". The most highly significant study compared the origin of respondents (that of U.S. visitors questioned while stopped at gasoline stations) with the origin of all U.S. passenger cars entering Ontario during 1965 on customs permits and remaining in the province two or more nights (*) which is shown in Table No.XLI.

Of all U.S. visitors included in our sample, those originating in the ten States which form our primary marketing area represented 83.3 per cent of the total. The Dominion Bureau of Statistics reported that in 1965, 90.3 per cent of U.S. visitors to Ontario originated in the ten States. The similarity is close, particularly if consideration is given to the fact that we are comparing 1967 with 1965. The greatest difference is observed in New York State, where 26.18 per cent of visitors originated in 1965, and only 16.08 in 1967. This is due largely to the attraction of Expo, which was visited by large numbers from New York State who entered the province of Quebec directly, without crossing through Ontario.

Socio economic data obtained from this report is basically similar to that obtained from several other U.S. studies prepared by this Department and other organizations. For instance, of U.S. visitors to Ontario, the average age of heads-of-parties was:

<u>Source</u>	<u>Average Age</u>
U.S. Tourist Survey (Prepared by the Ontario Department of Civil Service, 1966 (p.5)	42.7
Analysis of U.S. Visitor-Prospects to Ontario, 1967	45.3
U.S. Visitor Study, 1966 (McDonald Research Limited	45.0
Gas Station Survey, 1966	44.5
Gas Station Survey, 1967	41.3

(*) Dominion Bureau of Statistics - "Travel Between Canada and Other Countries, 1965"

Data concerning the occupation, income, model of car owned by respondent, show the same degree of similarity.

After analysis of data obtained by means of the "Accidental Quota sampling" method, we concluded that these respondents had the same characteristics as the average U.S. visitor, with the exception that they stayed in Ontario an average of 5 days, whereas according to Dominion Bureau of Statistics figures, the average U.S. visitor stays in Ontario 2.52 days.

As our gas station visitors stayed an average of almost a week, it appears they were mostly on vacation, would spend on the average, more money than short-term visitors, and therefore are a highly desirable type of tourist. This is a useful and interesting factor in our consideration of first, advertising and promotion policies in their areas of origin, and second, our development policies in their areas of destination.

First Visit to Ontario

According to Table No. I of this report, 33.3 per cent of our respondents visited Ontario for the first time in 1967.

In 1966, only 29 per cent of our respondents visited Ontario for the first time. The more than 4 per cent increase is due to the attraction of EXPO.

The State of Florida, from their experience in the tourist industry, considers that any jurisdiction (state or province) which can attract one-third or more new visitors every year has a satisfactory tourist rating.

A comparison of first-time visitors was made by age, in Table No. II. As is to be expected, the average age of first-time visitors was lower than that of repeat visitors, as follows:

<u>Respondents</u>	<u>Average Age</u>
First-visitors	38 years
Repeat-visitors	43 years

In Table No. III, first-time visitors and repeat-visitors were classified by occupation. There is no significant variation in the average with the exception of unskilled labourers, farmers, and housewives, whose incidence of first-time visits was quite high.

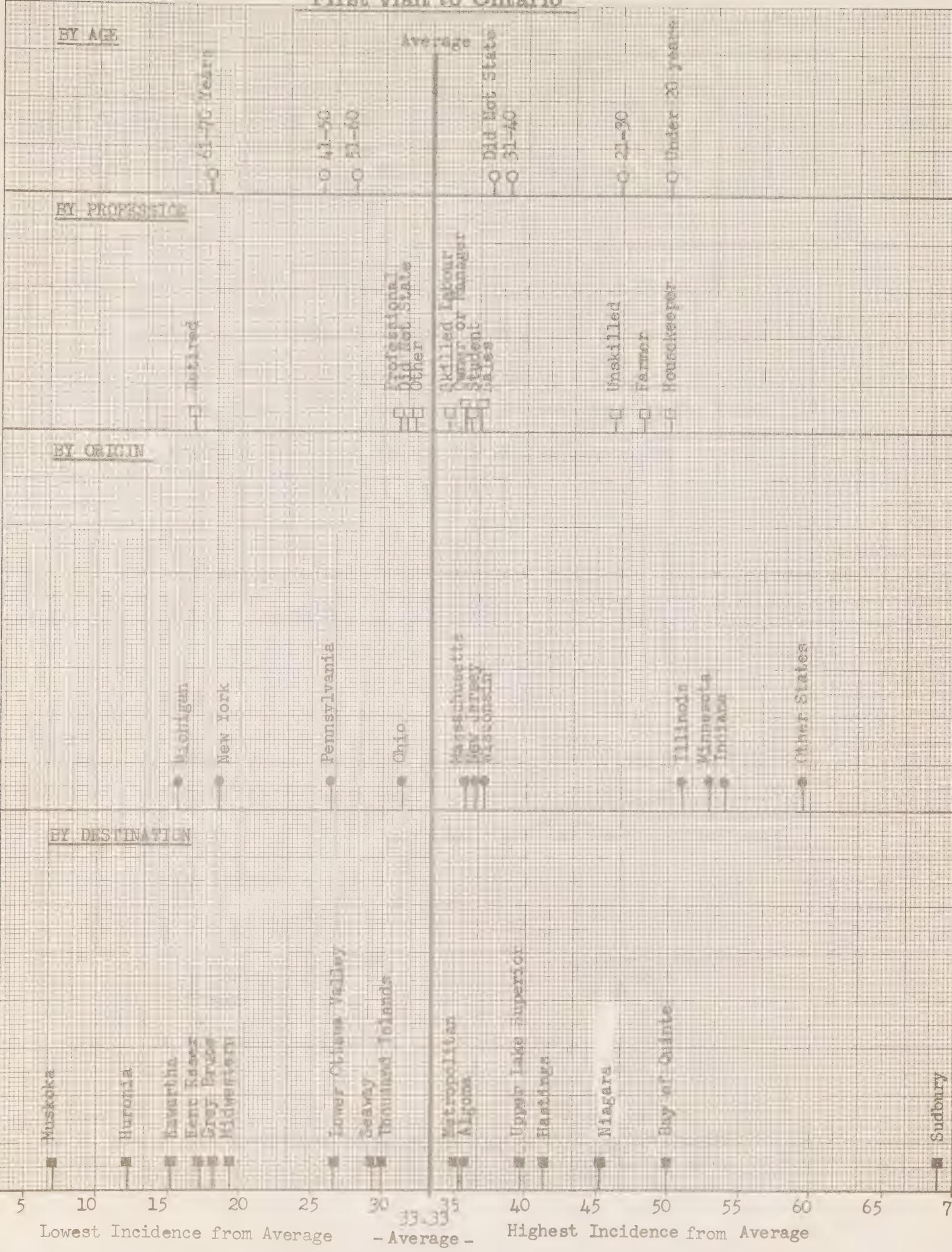
Data revealed in Table No. IV is much more significant. First-visit respondents and repeat-visitors were classified by origin, and it is interesting to note that there is a correlation between the incidence of visitors stating that EXPO brought them to Ontario, and the incidence of first-time visitors originating in those States where the incidence of first-time visitors was also very high.

From this it can be seen that EXPO brought a significant number of first-time visitors to Ontario.

In the states where interest in EXPO was low, the incidence of first-time visitors to Ontario was also low. The same tendency exists in distant states where a considerably higher incidence of first-time visitors appears, compared with neighbouring states, such as Michigan and New York.

Table No. V shows the number of first-time visitors to Ontario by destination, but there is no revealing significance in data obtained.

First Visit to Ontario



Number of Visits to Ontario

Table No. VI shows the number of visits to Ontario for tourists visiting Ontario more than once. The highest incidence occurs in the group "2 to 3 visits" (39.0%). The second highest incidence occurs in the "4 to 5 visits", with 24.0%.

The average number of visits to Ontario for repeat-visitors was 5.7.

If we compare these data with that obtained from analysis of visitors to Ontario Government Reception Centres, it can be seen that the average number of visits to Ontario is lower in the Gas Station Survey. As we will later observe (Table No. XXXV), the length of stay in Ontario for respondents in the Gas Station Survey was 4.9 days, compared with a length of stay of 6.3 days for respondents taking part in the Reception Centre Study. These two groups are therefore not identical, but there are some similarities. The main difference is that the length of stay for repeat-visitors is slightly less for respondents in the Gas Station Survey.

Table No. VIII shows the average number of visits of repeat-visitors, by vacation area. There is the same oscillation from the average of 5.7, as mentioned above, in the Reception Centre Study comparison. The highest average number of visits was in the Madawaska Valley vacation area. Others were as follows:

<u>Vacation Area</u>	<u>Average No of Visits</u>
Madawaska Valley	8.5
Muskoka	7.4
Grey-Bruce	7.2
Huronia-Lake Simcoe	7.2
Midwestern	6.7
Niagara-Iroquoia	6.2
Seaway Valley	6.0

The lowest number of repeat-visitors (2.5) was observed in the Nipissing and Lake of the Woods Vacation Areas.

How Ontario and its Attractions Lived up to
Respondents' Expectations

A large majority (72.34%) of first-time visitor respondents replied that they were satisfied with their Ontario visit. (See Table No. IX) Even after allowing for the fact this figure might be inflated for various reasons, the incidence of those who were happy with their first visit to Ontario was quite high.

The next question is: "Why was the incidence of satisfaction so high?". Because:

- (a) Ontario has so many natural scenic attractions?
- (b) of the concept that most Americans who had not visited Ontario previously had a high regard for Ontario as a Vacation area?

Whichever the case, it is obvious that these respondents now feel Ontario is an excellent place to visit and to spend their vacation. It has also been noted that when American visitors are attracted to Ontario in the first place they tend to return again and again, therefore the Department's efforts in advertising and promotion should be focused to attracting Americans for the first time. After they have seen the province, the majority are likely to return.

Table X supplies the answer to the question: "In what way did this Ontario visit not live up to Respondents' expectations?" Sixty-three respondents replied as follows:

Did not live up to expectations	6
Don't know	49
Did not reply	8
	63

More than half (33)"did not know" because they had just arrived in the province and had not formed an opinion. Approximately 10 per cent had not decided what they expected of their visit, and another 10 per cent had not yet made their decision. Only 6.35 per cent stated they expected a more rugged and colorful scenery, and a colder climate. Another 3.18 per cent expected better fishing. We may therefore conclude that the large majority of respondents consider Ontario an attractive place, and worthwhile visiting.

How Respondents Became Interested in
Visiting Ontario

Table No. XI shows the manner in which respondents first became interested in visiting Ontario. The highest single influencing factor was that of friends or relatives; 26.95 per cent by U.S. friends or relatives and 18.67 per cent by Ontario friends or relatives, totalling 45.62 per cent.

Results obtained in this study are similar to those obtained in other studies made by the Department, influence of friends or relatives being the most important influential factor in the following studies:

Gas Station Survey, 1967	- 45.62%
U.S. Tourist Survey (Ont. Dept. C.S.)	46.5%
Gas Station Survey, 1966	39.9%
Analysis of U.S. Visitor-Prospects to Ontario, 1966	27.2%
U.S. Visitor Study (McDonald Research Limited)	39.0%

The comparative Table "A", is included in Appendix II. This year, the results of the Gas Station Survey were not compared with those of other U.S. visitor studies made in previous years because the amount of travel in Ontario created by EXPO distorted the picture.

From Table No. XI, it can be seen that for 20.57 per cent of respondents, EXPO was the deciding influence on their decision to visit Ontario.

Advertising seen in newspapers and magazines was mentioned as the main reason for their visit to Ontario by 5.6 per cent of respondents. Advertising by the Canadian Government Travel Bureau attracted 1.5 per cent of respondents, and documentary or travel films seen accounted for 1.4 per cent of respondents' visits.

Basically, distribution of main influential factors in visiting Ontario is similar to that of Appendix II, but the total picture is distorted by those respondents who came to Ontario en route to and from EXPO. These represented 20.6 per cent of all visitors questioned.

Table No. XII shows the influential factor by occupation. There are no significant characteristics in total for any particular occupation, but there are some variations in the average, as may be seen on the last line of the table.

Table No. XIII shows main influential factors by origin. In this case, there are two separate tendencies to be observed. Those states situated close to Ontario had the highest incidence of influence by friends in the United States or Ontario, and a low incidence of EXPO visits as their influencing factor. On the other hand, states situated farther from the U.S. - Ontario border had a low incidence of influence of friends in the United States or Ontario, and a high incidence of EXPO visits as an influential factor. For example:

State of Origin	Friends in the U.S. or Ontario	En route to or from EXPO
Michigan	50.23%	12.21%
New York	47.76	13.43
Ohio	61.38	12.87
Indiana	10.71	53.58
Rest of U.S. (those States not included in Ontario primary tourist market)	31.87	37.50

Table No. XIV and Graph No. 2 show clearly that in 1967, the most important single factor in influencing visitors to come to Ontario in the case of first-time visitors is significantly different from that of repeat-visitors.

	Influence of friends and/or relatives in U.S.	Influence of friends and/or relatives in Ontario	Visiting Expo
First-time	22.0%	9.2%	42.9%
Repeat-visitors	29.0%	23.3%	9.5%

The main difference is noticed in those visitors who were en route to or from EXPO, proving that a special event attracts many new tourists who otherwise would not have come to Ontario.

The question now is "How can Ontario create a substitute for Expo?". The Stratford Theatre Festival could be expanded to include more art exhibitions and other attractions to induce visitors interested in culture to come to Stratford, and to stay longer.

The Canadian National Exhibition could be modernised and expanded to induce more first-time visitors to come to Toronto. Our many downtown and uptown shopping centres, Museums, Art Galleries, Casa Loma, and of course, the New City Hall, should also be featured.

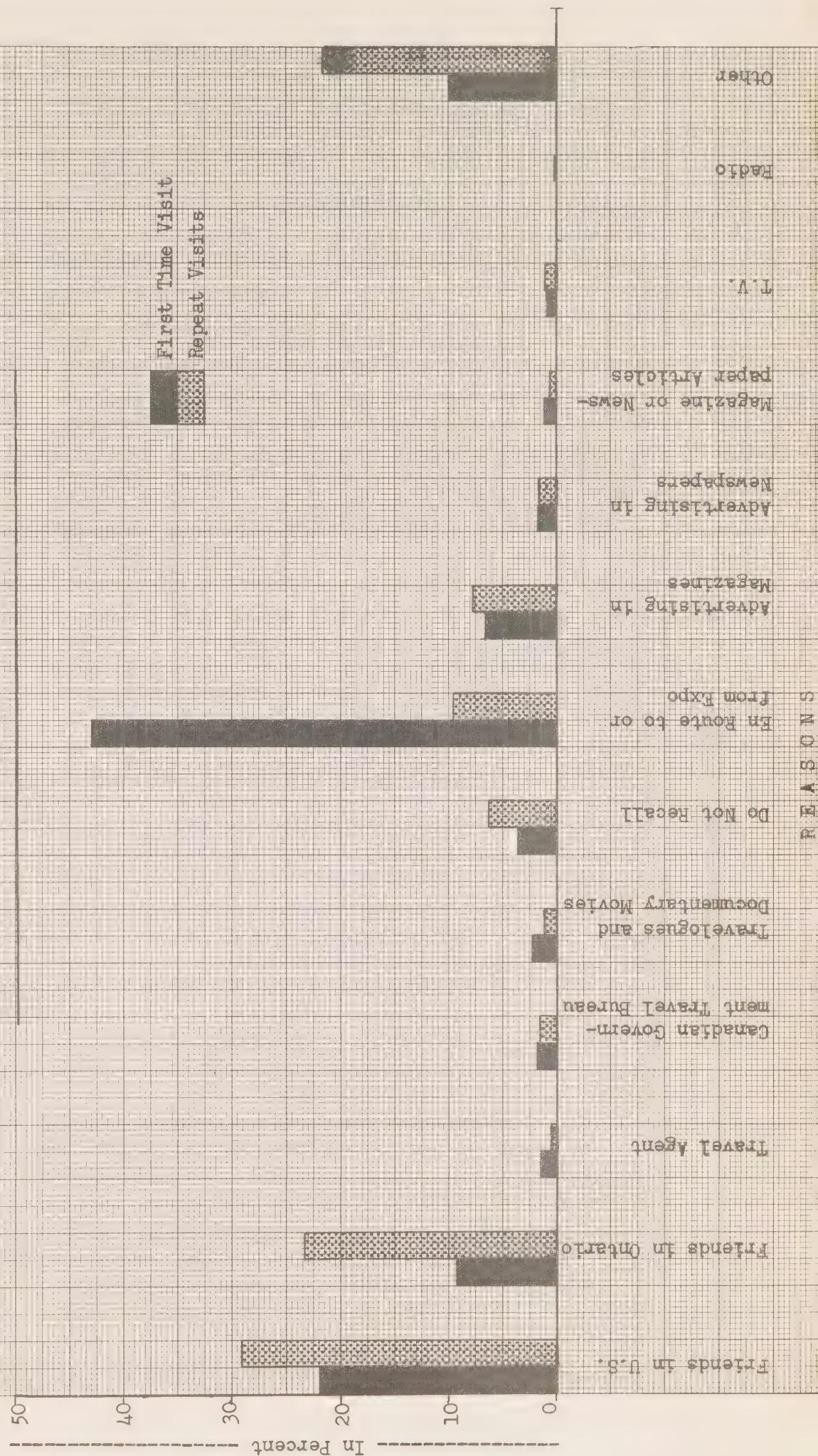
The Ottawa Parks Commission has created a delightful scenic area in the City of Ottawa which could be promoted along with historical buildings, and events such as the popular Changing of the Guard.

Niagara Falls and Niagara-on-the-Lake have much historic interest and scenic beauty to offer first-time visitors and intensive advertising to promote this area would likely bring satisfactory results.

GRAPH NO. 2

COMPARISON OF FIRST TIME AND REPEAT VISITORS TO ONTARIO,

ACCORDING TO REASONS - IN PER CENT



Advertisements - Noticed in U.S. Magazines

Of the 846 respondents, 53.9 per cent stated they had noticed
 (*)
 Ontario advertising in U.S. publications. Approximately 30 per cent
 stated they had not noticed any Ontario advertising, and the balance
 of 17 per cent could not recall seeing any advertising, or did not
 reply to the question. (See Table XV)

Respondents stating they had noticed Ontario travel advertising
 in U.S. magazines (449) were asked to specify the particular magazine
 in which it appeared. This information is included in Table XIV.

It is interesting to note that if we consider magazines only,
 65 per cent of the advertisements reported on were actually seen in
 magazines in which advertisements were placed. If newspaper
 advertisements are included, the total is 76 per cent correctly
 noticed.

It is obvious that the correlation between advertisements
 noticed and the actual magazine subscribed to is quite significant,
 confirming a number of aspects:

- 1) that respondents took the questioning seriously
 and did their best to answer correctly
- 2) that our advertising did create an impact on U.S.
 readers
- 3) that we must not forget the two main facts shown in
 Tables XV and XVI:
 - (a) a high percentage (53% of all respondents)
 remembered Ontario advertising, and of that
 percentage:
 - (b) 76 per cent remembered in which magazine or
 newspaper they had seen the advertisement,
 correctly corresponding with those publications
 in which our advertising had been placed.

These two facts show that our advertising does indeed create
 an impact and most important, it is effective over a long period
 of time.

(*) Note: The 1966 Gas Station Survey revealed that 49 per cent of
 respondents stated they had noticed Ontario tourist
 advertisements in U.S. Consumer magazines.

It is probable that many of those persons who influenced some of our visitors to come to Ontario were also exposed to our advertising and even though they did not themselves visit the province, they were favourably impressed, to the extent of recommending an Ontario vacation to their friends.

If we take into account the fact that an additional 24% of all respondents recalled our advertisements but were mistaken in naming the publication in which they appeared, the impact of our promotion is still significant.

At least 45 per cent of respondents were aware of and recalled our advertisements. We will again focus on this factor in studies to be carried out in future.

Advertising or promotion done by the Canadian Government Travel Bureau or by Canadian Carriers could also have been influential in bringing visitors to Ontario.

Magazines Subscribed to by Visitor-Respondents

Table No. XVII shows the number of magazines subscribed to by visitor-respondents. The most interesting facts revealed are that of 846 respondents:

19.7% subscribed to one magazine only
(Approximately one-third to Readers' Digest)

26.0% subscribed to two magazines

15.8% subscribed to three magazines

11.8% subscribed to four or more magazines

Those respondents who subscribed to three or four magazines received altogether, 46 per cent of all magazine subscriptions. 26.6 per cent did not subscribe to any magazine.

Reception Centres

Tables Nos. XVII to XXII show data concerning Question No. 5:

"Do you happen to know if the Ontario Government maintains reception centres to assist visitors such as yourself?"

- 74.4% were aware of Government Reception Centres
- 19.4% were not aware
- 6.0% did now know, or did not reply.

Table No. XIX shows respondents' awareness of Ontario Government Reception Centres by State of origin. Naturally, awareness is highest in bordering States and lower in more distant States.

The same tendency is observed in Table No. XX, which shows use made by respondents of Ontario Government Reception Centres.

In Graph No. 3, both series of data (awareness and use of reception centres) are shown. It may be seen there is a correlation between awareness of the existence of the Centres, and their use.

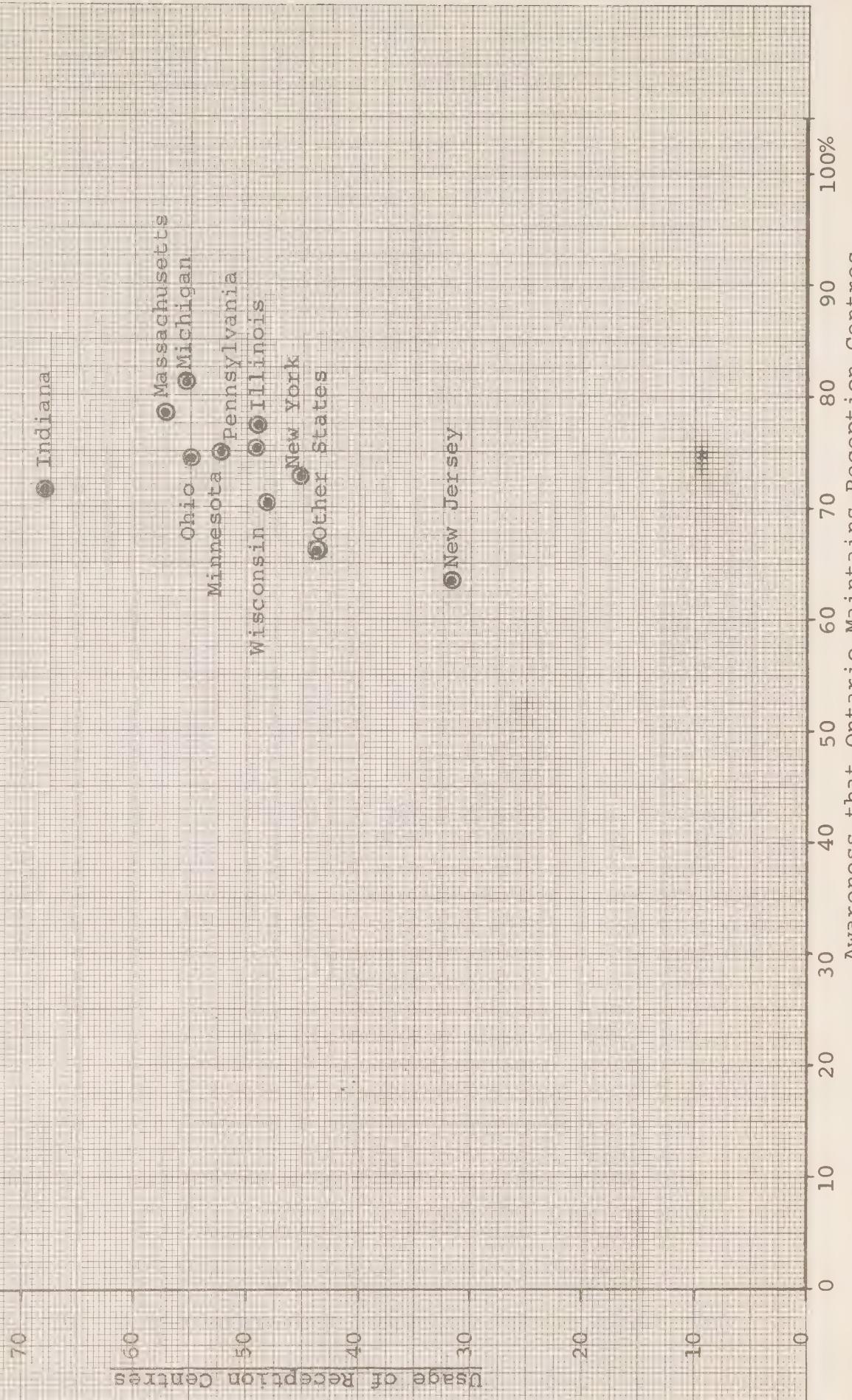
Reception Centres not only facilitate travel for visitors to Ontario, but promote travel throughout the province and it seems advisable in view of these facts that our U.S. advertising should encourage their use.

Table XX shows usage of Ontario Government Reception Centres by destination of visitors (Vacation Areas). There is no particular difference in the various vacation areas.

Tables Nos. XXI and XXII show intention to visit Ontario Government Reception Centres by origin and destination of respondents.

CORRELATION BETWEEN THE AWARENESS AND USAGE
OF ONTARIO RECEPTION CENTRES

GRAPH NO. 3



Interesting - and Disappointing Aspects
in Ontario Observed by U.S. Visitors

Table No. XXIV indicates which aspects of their Ontario visit were found most interesting by U.S. visitors. Altogether 846 replied to this question, reporting on 1,041 different aspects, as follows:

Attractions, Historic Sites and Museums	- 28.9%
Scenery, (includes cleanliness of outdoors, and seeing wildlife)	- 17.0%
Highways, Roads (includes traffic flow, road conditions, etc)	- 8.2%
Hunting and/or Fishing	- 6.8%
Camping, and favourable comments on Provincial parks and Picnic	- 6.6%
Boating (includes canoeing, cruises, interest in locks and canal systems)	- 2.6%

Spectacular Ontario attractions such as Niagara Falls, Toronto's new City Hall, and the Changing of the Guard on Parliament Hill at Ottawa, are very much appreciated by U.S. visitors and have come to be associated with Canada and Ontario much as "night life" is associated with Paris, bull fights with Spain, and the Tower of London and the Changing of the Guard at Buckingham Palace is with England. All should continue to be promoted.

Table No. XXV indicates which aspects of their Ontario visit were disappointing to some U.S. visitors. Complaints regarding highways and roads were made by 6.4 per cent of respondents, about accommodation, restaurants and entertainment, by 4.0%, and 69.1 per cent stated they had no disappointments during their Ontario visit. Approximately 2 per cent complained about provincial and private campsites, and 1.9% complained about fishing and hunting guides. Most complaints concerned lack of facilities, accommodation rates, and poor service.

Intention to Recommend Ontario as a Place
to Vacation to Friends - and
Intention to Revisit Ontario

Respondents interviewed were asked if they would be inclined to recommend an Ontario trip or vacation to their neighbours and friends. Of those responding, 89.8 per cent stated they would be so inclined, and only 0.2 per cent stated they would not. The balance of approximately 10 per cent did not know, or did not reply. (See Table No. XXVI)

A subsequent question: "How likely would you be to revisit Ontario?" was asked, and responses were as follows:

Very likely	61.1%
Quite likely	27.7%
Not too likely	8.6%
Not likely	0.6%
Did not answer	2.0%

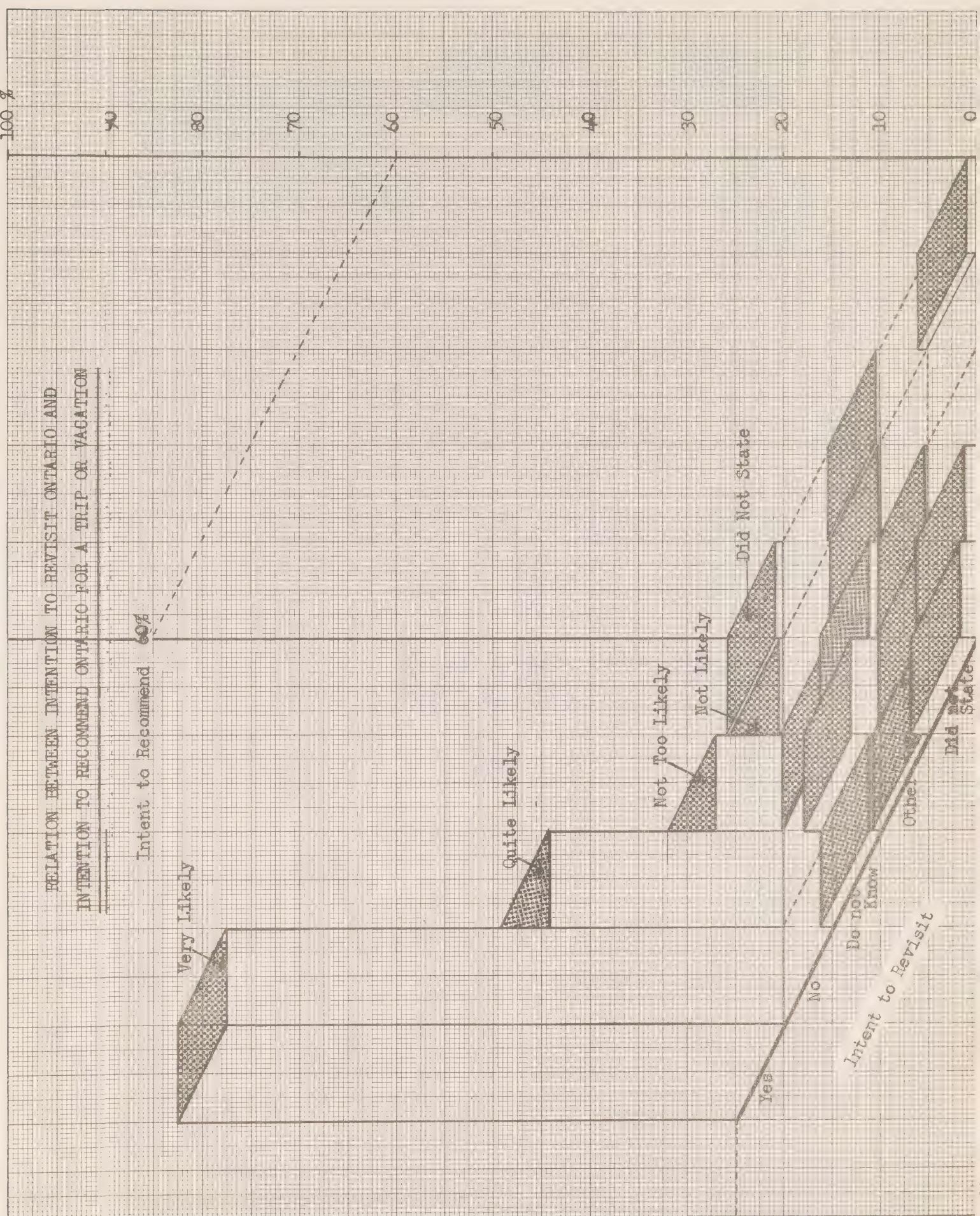
(See Table No. XXVII)

Table No. XXVIII and Graph No. 4 were prepared to show the correlation between those who intended to recommend Ontario and those who intended to revisit. Both show a high correlation.

It is quite clear then that by succeeding in inducing foreign visitors (in this case U.S. visitors) to return to Ontario, we have also obtained promoters for the province. The importance of this type of promoter was revealed in Table No. XI, where it was shown that 26.9 per cent of U.S. visitors first became interested in visiting Ontario upon recommendation of a friend or relative in the U.S. If recommendations of Ontario friends or relatives are added to this, we arrive at a total of 45.6 per cent of respondents who were motivated by friends, to visit Ontario.

As noticed earlier, attitudes of first-time visitors and of repeat-visitors are significantly different, and for this reason we made a separate tabulation of replies of first-time visitors and repeat-visitors to the question: "Would you be inclined to recommend Ontario for a trip or vacation to your neighbours and friends?".

**RELATION BETWEEN INTENTION TO REVISIT ONTARIO AND
INTENTION TO RECOMMEND ONTARIO FOR A TRIP OR VACATION**



From the results, (shown in Table No. XXIX) we may deduce the following:

	Per cent of Respondents	
	First-time Visitors	Repeat- Visitors
Intention to Recommend Ontario visit to friends	82.3	93.7
Intention to Not Recommend Ontario visit to friends	0.35	0.18
No decision at present	11.35	3.05
No reply	5.32	1.97

We may therefore conclude that repeat-visitors had the highest incidence of intent to recommend Ontario visits to their friends, the lowest incidence of uncertainty about this intent, and also the lowest incidence of "no reply".

Table No. XXX shows the intention to revisit of first-time visitors and of repeat-visitors. The main facts revealed were as follows:

	Per cent of Respondents	
	First-time Visitors	Repeat- Visitors
Very likely to revisit	33.7	75.1
Quite likely	40.8	20.8
Not too likely	20.2	2.9

There is a higher incidence of intent to revisit Ontario among repeat-visitors.

Tables Nos. XXIX and XXX have been combined in Table No. XXXI to again prove there is a correlation between intent to revisit Ontario and intent to recommend an Ontario trip or vacation to friends. This table also shows that frequency of intent to revisit and intent to recommend is highest among repeat-visitors.

We may conclude that on the one hand, our advertising and publicity efforts should be concentrated in attracting first-time visitors in order to secure an increase of tourists, and on the other hand, more attention should be directed to the well-being of repeat-visitors as they are permanent customers of the province, as well as promoters of Ontario as a vacation destination.

In Table No. XXXII, respondents who stated they planned to revisit Ontario gave as their main reasons, the following replies:

Main Reasons	Per cent of Respondents
Enjoyed this visit or previous trips and plan to return	15.39%
Desire to see more of Ontario at another time, or revisit a specific area	11.19
Visiting friends or relatives (or were influenced to visit by them)	10.97
Fishing and/or hunting	9.64
Like Ontario (attractions, scenery, people, etc) and would like to return	8.20
Own a cottage or farm in Ontario	3.32

Naturally, where linkage with Ontario is strong, the intensity of desire to revisit is high. For example, of thirty respondents who stated they owned a cottage or farm in Ontario, twenty-eight said they would "very likely" return, and only two replied "quite likely".

Accommodation

Table No. XXXIII shows the type of overnight accommodation used by respondents. In summary, these were as follows:

Type of Accommodation Used	Per cent of Respondents
Hotels/motels	46.9%
Cabins, own or rented cottage	14.8
Camp and trailer sites	24.4
Homes of friend or relative	6.7
Other	5.7
Did not state	1.5
	100.0%

This table shows the heavy demand for motels, cottages and campsites. This tendency was confirmed by an occupancy survey of Ontario tourist establishments taken during the month of July, 1966 and July, 1967, figures for which are attached, in Appendix II.

Development of establishments should therefore be concentrated on these three types of accommodation.

Table No. XXXIV showed that the vast majority of respondents had no difficulty in securing accommodation in Ontario, only four per cent stating they had any trouble.

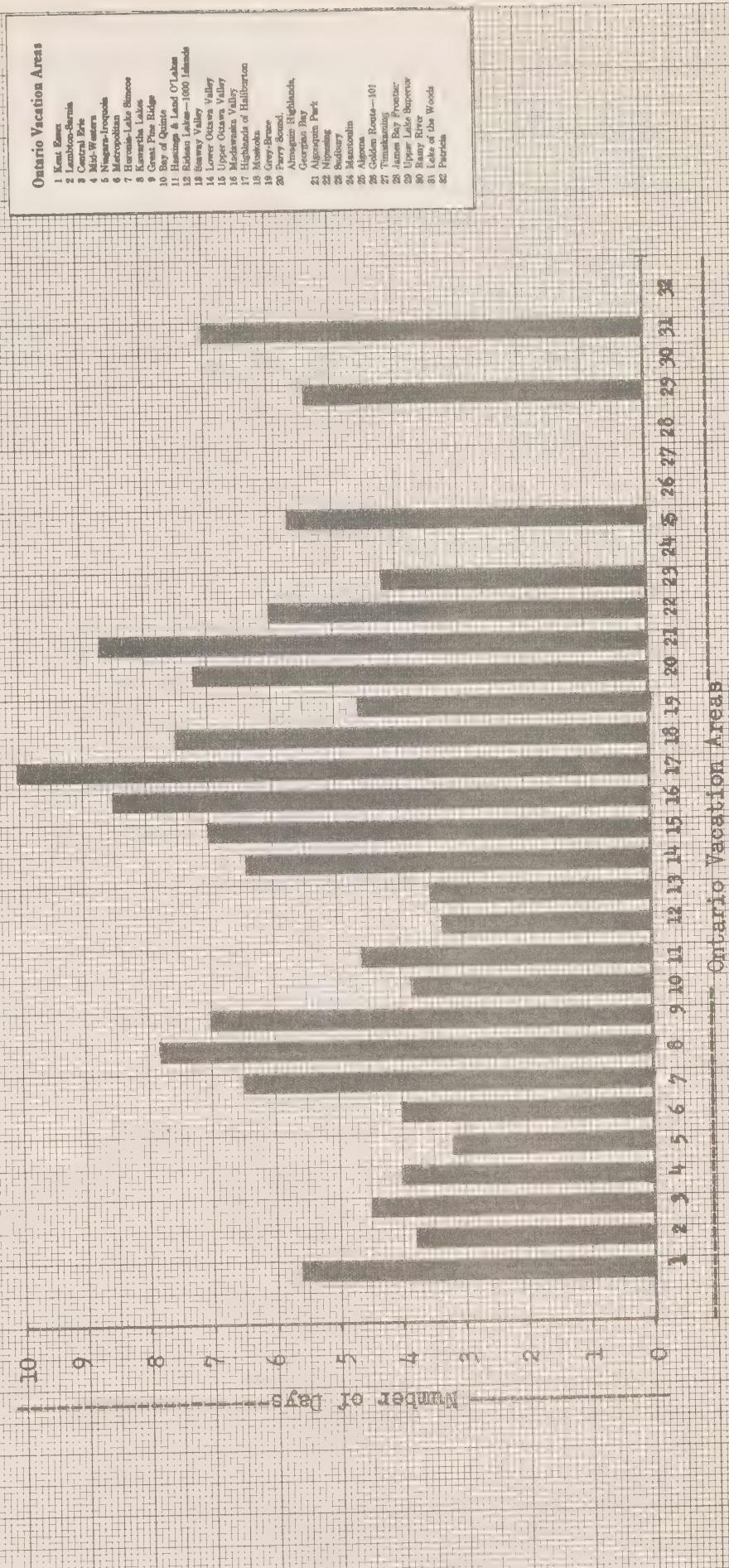
Length of Stay in Ontario

Table No. XXXV gives the average length of stay in Ontario by origin of respondents. The average for all U. S. States was 4.9 days and the variation between States was quite small. The highest average length of stay (6.6 days) was made by visitors from Pennsylvania, and the lowest (4.4 days) was made by those respondents originating in the States of Wisconsin and Indiana, and those states which are not in our primary tourist market.

The average length of stay in Ontario by destination, is shown in Table No. XXXVI, and Graph No. 3. Variation in the average is slightly higher in this case. The longest average length of stay was observed in our traditional vacation and recreation areas in Central Ontario.

The shortest average length of stay was observed in Niagara-Iroquoia, Metropolitan, Rideau - Thousand Islands, and the Seaway Valley Vacation Areas.

AVERAGE LENGTH OF STAY IN ONTARIO BY DESTINATION



Socio-Economic Aspects of U.S. Visitors

The main socio-economic aspects of respondents are included in Tables Nos. XXXVII to XL. In Summary, these are as follows:

- Average age of head of party	- 41.3 years
- Average income per year of head of party	\$10,210.
- Average age of car owned by head of party	2.2 years
- 1965 or later model car was owned by head of party respondent	68.53%

All of the above is in accordance with data we have obtained in a number of studies which have revealed a socio-economic profile of our U.S. visitors.

Data included in Table No. XL shows the occupation of respondents and also follows the same pattern of occupation as was indicated in a number of U.S. visitor studies carried out by this Department.

Table No. XLI shows the origin of U.S. visitors compared with origin of visitors obtained by the Dominion Bureau of Statistics. In 1967, the ten U.S. States comprising our primary tourist market generated 83.27 per cent of respondents (Gas Station Survey) and according to D.B.S., in 1965, 90.28 per cent of U.S. passenger cars visiting Ontario on customs permits for two or more nights stay, originated in these same ten States.

We may conclude that the socio-economic profile of U.S. visitors as revealed by the "Accidental Quota Sample" method used in this study, is the same as that obtained in a number of other studies. For this reason, we believe the facts and indications on various aspects of U.S. tourist behaviour as included in this report may be regarded as valid.

Analysis of U.S. visitors

- by Occupation

Table No. XL shows that 28.48 per cent of all respondents were in professional occupations. The previous Gas Station Survey, carried out in 1966, showed that 28.9 per cent of U.S. respondents were in this group which generates a large number of visitors to Ontario. As a matter of fact, it has the highest incidence of visitors to the province.

For this reason, we decided to do a detailed analysis of respondents in professional occupations, and obtained the following information:

<u>Head of Party</u>	<u>Occupation</u>	
	Professional	Non-Professional
Average annual income	\$11,925.	\$10,210.
Average age	40.1 years	41.3 years
Average length of stay	5.6 days	4.9 days

These data are included in Tables Nos. XLII, XLIII and XLIV.

In Table No. XLV, there is a comparison of intention to recommend Ontario as a place to visit to others, by professional and non-professional groups, as follows:

<u>Intention to Recommend Ontario Vacation to others</u>	
Professional	91.7%
Non-professional	88.9%

The incidence of "don't know" or "did not state" was higher in non-professionals than in professionals.

Table No. XLVI shows intention to revisit Ontario, and in this case professionals had a higher incidence of intention to revisit than had non-professionals:

Intention to Revisit Ontario	
Professionals	90.46%
Non-Professionals	87.95%

Table No. XLVII shows the type of accommodation used by professionals and non-professionals. As expected, because of their generally higher income, hotel and motor hotels were used more extensively by the professional group, compared with a higher usage of tourist cabins, campsites and rental of cottage or ownership of cottage by non-professionals.

It is interesting that 10.4 per cent of professionals used homes or cottages of friends or relatives as their accommodation compared with 5.4 per cent of non-professionals.

Table No. XLVIII shows the origin of professional visitors and by comparing this with Table XLI, which shows origin of all respondents, there is no significant variation to be observed except in visitors originating in those states other than those included in our ten primary marketing area states, which generated 21.5 per cent of professional respondent-visitors, and only 16.7 per cent of all respondents. If out of all respondents, professionals were excluded, the percentage would have been lower.

In summary, we could say that professionals, on the average, have a higher income, visit Ontario more frequently, stay longer, and are slightly younger than other occupation groups. They are more inclined to recommend an Ontario visit to their friends, are more inclined to revisit the province, use the more expensive kind of accommodation during their stay, and originate in slightly more distant parts of the United States.

TABLES I to XLVIII

TABLE I

FIRST VISIT TO ONTARIO

	<u>Number</u>	<u>Per cent</u>
Yes	282	33.3%
No	558	65.96
Did not state	6	0.71
<u>Total</u>	846	100.00%

TABLE IIFIRST VISIT TO ONTARIO - BY AGE GROUP

<u>AGE - HEAD-OF-PARTY</u>		YES	NO	DID NOT STATE	TOTALS
Under 20	Number Percent	9 50.00	9 50.00	- -	18 100.00 %
21 - 30	Number Percent	60 46.51	69 53.49	- -	129 100.00 %
31 - 40	Number Percent	95 38.78	149 60.82	1 .40	245 100.00 %
41 - 50	Number Percent	57 25.68	163 73.42	2 .90	222 100.00 %
51 - 60	Number Percent	37 28.03	93 70.45	2 1.52	132 100.00 %
61 - 70	Number Percent	12 17.65	55 80.88	1 1.47	68 100.00 %
Did Not State	Number Percent	12 37.50	20 62.50	- -	32 100.00 %
TOTAL	Number Percent	282 33.33	558 65.96	6 .71	846 100.00 %
Average Age for Respondent		38	43	-	41.3

TABLE III

FIRST VISIT TO ONTARIO BY PROFESSION

PROFESSION		YES	NO	DID NOT STATE	TOTALS
Professional	Number Percent	75 31.12	165 68.46	1 .42	241 100.00 %
Owner or Manager	Number Percent	35 36.08	62 63.92	- -	97 100.00 %
Sales	Number Percent	28 36.84	48 63.16	- -	76 100.00 %
Skilled Labour	Number Percent	74 34.42	139 64.65	2 .93	215 100.00 %
Unskilled Labour	Number Percent	6 46.15	7 53.85	- -	13 100.00 %
Farmer	Number Percent	14 48.28	15 51.72	- -	29 100.00 %
Retired	Number Percent	11 16.67	53 80.30	2 3.03	66 100.00 %
Housekeeper	Number Percent	9 50.00	9 50.00	- -	18 100.00 %
Student	Number Percent	9 36.00	16 64.00	- -	25 100.00 %
Other	Number Percent	9 32.14	19 67.86	- -	28 100.00 %
Did Not State	Number Percent	12 31.58	25 65.79	1 2.63	38 100.00 %
TOTALS	Number Percent	282 33.33	558 65.96	6 .71	846 100.00 %

TABLE IV

FIRST VISIT TO ONTARIO BY ORIGIN

STATE		YES	NO	DID NOT STATE	TOTALS
Michigan	Number Percent	33 15.49	180 84.51	- -	213 100.00 %
New York	Number Percent	25 18.25	111 81.02	1 .73	137 100.00 %
Ohio	Number Percent	32 31.37	67 65.69	3 2.94	102 100.00 %
Pennsylvania	Number Percent	15 26.32	42 73.68	- -	57 100.00 %
Illinois	Number Percent	27 50.94	26 49.06	- -	53 100.00 %
Minnesota	Number Percent	21 52.50	18 45.00	1 2.50	40 100.00 %
New Jersey	Number Percent	8 36.36	14 63.64	- -	22 100.00 %
Wisconsin	Number Percent	10 37.04	17 62.96	- -	27 100.00 %
Massachusetts	Number Percent	5 35.71	9 64.29	- -	14 100.00 %
Indiana	Number Percent	15 53.57	13 46.43	- -	28 100.00 %
Other States	Number Percent	91 59.48	61 39.87	1 .65	153 100.00 %
TOTALS	Number Percent	282 33.33	558 65.96	6 .71	846 100.00 %

TABLE V

FIRST VISIT TO ONTARIO BY DESTINATION

VACATION AREA		YES	NO	DID NOT STATE	TOTALS
Kent-Essex	Number	8	38	-	46
	Percent	17.39	82.61	-	100.00 %
Lambton-Sarnia	Number	2	7	-	9
	Percent	22.22	77.78	-	100.00 %
Central Erie	Number	3	6	-	9
	Percent	33.33	66.67	-	100.00 %
Mid-Western	Number	7	29	-	36
	Percent	19.44	80.56	-	100.00 %
Niagara-Iroquois	Number	52	63	-	115
	Percent	45.22	54.78	-	100.00 %
Metropolitan	Number	45	83	-	128
	Percent	35.16	64.84	-	100.00 %
Huronia-Lake Simcoe	Number	6	43	-	49
	Percent	12.24	87.76	-	100.00 %
Kawartha Lakes	Number	5	24	4	33
	Percent	15.15	72.73	12.12	100.00 %
Great Pine Ridge	Number	1	-	-	1
	Percent	100.00	-	-	100.00 %
Bay of Quinte	Number	16	16	-	32
	Percent	50.00	50.00	-	100.00 %
Hastings-Land O'Lakes	Number	19	27	-	46
	Percent	41.30	58.70	-	100.00 %
Rideau Lakes - 1000 Is.	Number	3	7	-	10
	Percent	30.00	70.00	-	100.00 %
Seaway Valley	Number	10	24	-	34
	Percent	29.41	70.59	-	100.00 %
Lower Ottawa Valley	Number	16	44	-	60
	Percent	26.67	73.33	-	100.00 %
Upper Ottawa Valley	Number	1	-	-	1
	Percent	100.00	-	-	100.00 %
Madawaska Valley	Number	1	-	1	2
	Percent	50.00	-	50.00	100.00 %
Haliburton Highlands	Number	-	3	-	3
	Percent	-	100.00	-	100.00 %
Muskoka	Number	2	26	-	28
	Percent	7.14	92.86	-	100.00 %
Grey-Bruce	Number	2	9	-	11
	Percent	18.18	81.82	-	100.00 %
Parry-Georgian Bay	Number	2	5	-	7
	Percent	28.57	71.43	-	100.00 %
Algonquin Park	Number	3	4	-	7
	Percent	42.86	57.14	-	100.00 %

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next page

TABLE V (Continued)

FIRST VISIT TO ONTARIO BY DESTINATION

VACATION AREA		YES	NO	DID NOT STATE	TOTALS
Nipissing	Number	4	4	-	8
	Percent	50.00	50.00	-	100.00 %
Sudbury	Number	20	9	-	29
	Percent	68.97	31.03	-	100.00 %
Manitoulin	Number	-	-	-	-
	Percent	-	-	-	-
Algoma	Number	17	31	-	48
	Percent	35.42	64.58	-	100.00 %
Golden Route - 101	Number	-	-	-	-
	Percent	-	-	-	-
Timiskaming	Number	-	-	-	-
	Percent	-	-	-	-
James Bay Frontier	Number	-	-	-	-
	Percent	-	-	-	-
Upper Lake Superior	Number	37	55	1	93
	Percent	39.78	59.14	1.08	100.00 %
Rainy River	Number	-	-	-	-
	Percent	-	-	-	-
Lake of the Woods	Number	-	1	-	1
	Percent	-	100.00	-	100.00 %
Patricia	Number	-	-	-	-
	Percent	-	-	-	-
TOTAL	Number	282	558	6	846
	Percent	33.33	65.96	.71	100.00 %

TABLE VI

NUMBER OF VISITS TO ONTARIO FOR TOURISTS
WHO VISITED ONTARIO MORE THAN ONCE

VISITS	NUMBER	PERCENT
2 - 3	220	39.00
4 - 5	135	23.94
6 - 7	36	6.38
8 - 9	20	3.55
Over 10	104	18.44
Other	49	8.69
TOTAL	564	100.00 %

Average Number of Visits to Ontario for
Tourists who visited Ontario more than
once - 5.7

TABLE VII

AVERAGE NUMBER OF VISITS TO ONTARIO
FOR TOURISTS WHO VISITED ONTARIO MORE THAN ONCE
- BY ORIGIN

ORIGIN	AVERAGE NUMBER OF VISITS TO ONTARIO
Michigan	6.4
New York	6.7
Ohio	5.4
Pennsylvania	5.4
Illinois	4.3
Minnesota	4.9
New Jersey	4.9
Wisconsin	3.9
Massachusetts	2.8
Indiana	5.1
Other States	4.1
AVERAGE NUMBER OF VISITS FROM ALL STATES	5.7

TABLE VIII

AVERAGE NUMBER OF VISITS TO ONTARIO
FOR TOURISTS WHO VISITED ONTARIO MORE THAN ONCE
- BY DESTINATION

VACATION AREA	AVERAGE NUMBER OF VISITS
Kent-Essex	5.9
Lambton-Sarnia	4.3
Central Erie	4.6
Mid-Western	6.7
Niagara-Iroquois	6.2
Metropolitan	6.0
Huronia-Lake Simcoe	7.2
Kawartha Lakes	5.1
Great Pine Ridge	-
Bay of Quinte	5.6
Hastings-Land O'Lakes	4.4
Rideau Lakes - 1000 Islands	3.3
Seaway Valley	6.0
Lower Ottawa Valley	5.5
Upper Ottawa Valley	-
Madawaska Valley	8.5
Haliburton Highlands	3.8
Muskoka	7.4
Grey-Bruce	7.2
Parry-Georgian Bay	3.0
Algonquin Park	4.0
Nipissing	2.5
Sudbury	5.3
Manitoulin	-
Algoma	5.3
Golden Route - 101	-
Timiskaming	-
James Bay Frontier	-
Upper Lake Superior	4.1
Rainy River	-
Lake of the Woods	2.5
Patricia	-
AVERAGE FOR ALL VACATION AREAS	5.7

TABLE IX

HAS ONTARIO AND ITS ATTRACTIONS

LIVED UP TO YOUR EXPECTATIONS?

(This question was directed only to the 282 respondents who stated they were in Ontario for the first time.)

	<u>Number</u>	<u>Per cent</u>
Yes	204	72.34%
No	8	2.84
Don't know	48	17.02
Did not reply	7	2.48
Other	15	5.32
<hr/> <u>Total</u>	282	100.00%

TABLE X

IN WHAT WAY DID ONTARIO VISIT NOT LIVE UP TO
RESPONDENTS' EXPECTATIONS?

REASON GIVEN	NO. OF RESPONDENTS	IN PERCENT
Don't Know - Just arrived	33	52.38
Had not formed any definite expectations	6	9.52
No opinion as yet - visited for a few hours only - or just passing through	6	9.52
Expected more rugged and colourful scenery, colder climate	4	6.35
Fishing not up to expectations	2	3.18
Other	4	6.35
Did Not State	8	12.70
TOTAL NUMBER OF RESPONDENTS	63	100.00 %

NOTE: This question was directed only to those respondents
whose reply to question 1(c) was: No
 Don't Know
 Did Not Answer

See Table No. 8

TABLE XI

HOW RESPONDENT FIRST BECAME INTERESTED IN ONTARIO

	NUMBER	PERCENT
Recommended by Friends in U. S.	228	26.95)
) 45.62%
Friends in Ontario	158	18.67)
Travel Agent	6	.71
Canadian Travel Bureau	13	1.54
Travelogues or Documentary Movies	12	1.42
Do Not Recall	45	5.32
En route to or from Expo	174	20.57
Magazine Advertising	33	3.90)
)
Newspaper Advertising	14	1.65)
) 6.26%
Magazine-Newspaper Article	6	.71)
T.V.	7	.83
Radio	1	.12
Other	149	17.61
 TOTALS	846	100.00 %

TABLE XII

HOW RESPONDENT FIRST BECAME INTERESTED IN ONTARIO BY PROFESSION GROUPS

OCCUPATIONS	FRIENDS IN U.S.		FRIENDS IN ONT.		TRAVEL AGENT		CAN. TRV. BUREAU		TRAVELOGUES OR DOCUMENTARY MOVIES		DO NOT RECALL		EN ROUTE TO OR FROM EXPO		ADVERTISING IN MAGAZINES		MAG-NEWS- PAPERS		TV		RADIO		OTHER		TOTALS	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Professional	59	24.79	42	17.65	.42	2.94	1	7	.42	4.62	22.27	53	11	5	2	—	—	46	19.33	33	100.00	238	100.00 %			
Owner or Manager	27	28.13	23	23.96	2	2.07	2	2	2.08	2.08	3.13	21	4	4	—	1.04	1.04	—	10.42	10.42	10.42	10.42	100.00 %			
Sales	21	27.63	12	15.78	—	—	—	2	2.63	2.63	5	18	3	1	—	1.32	1.32	—	17.11	17.11	17.11	17.11	100.00 %			
Skilled Labour	65	30.52	37	17.37	.94	2	.47	1	1.88	1.88	5.63	12	38	12	1	—	1.47	1.47	.47	18.31	18.31	18.31	18.31	100.00 %		
Unskilled Labour	2	15.38	2	15.38	—	—	—	—	—	—	23.08	3	4	—	—	—	—	—	—	—	—	—	—	—	100.00 %	
Farmer	9	31.03	5	17.24	—	—	—	—	3.45	3.45	10.34	7	3	1	—	3.45	3.45	—	—	—	—	—	—	—	100.00 %	
Retired	21	31.82	20	30.30	—	—	—	3	4.55	4.55	—	5	5	—	—	1.51	1.51	—	—	—	—	—	—	—	100.00 %	
Housekeeper	6	35.29	4	23.54	—	—	—	1	5.88	5.88	—	1	5.88	—	—	—	—	—	5.88	5.88	—	—	—	—	23.53	100.00 %
Student	7	28.00	3	12.00	—	—	—	—	—	—	—	32.00	8	8	2	—	8.00	8.00	—	—	—	—	—	—	—	100.00 %
Other	7	25.00	4	14.29	—	—	—	1	3.57	3.57	3.57	7	7	2	—	—	3.57	3.57	—	—	—	—	—	—	—	100.00 %
Did Not State	4	10.81	6	16.22	1	2.70	—	—	—	—	10.81	12	12	—	3	8.11	8.11	—	—	2	2	—	—	13.51	100.00 %	
TOTALS	228	26.95	158	18.67	6	.71	1.54	13	1.2	1.42	5.32	45	14	6	7	.71	3.90	20.57	1.65	.71	.71	.71	.71	.71	846	100.00 %

TABLE XIII

HOW RESPONDENT FIRST BECAME INTERESTED IN ONTARIO BY ORIGIN

STATE	FRIENDS IN U.S.	FRIENDS IN ONT.	TRAVEL AGENT	CAN. TRV. BUREAU	TRAVELLOGUES OR DOCUMENTARY MOVIES	DO NOT RECALL	IN ROUTE TO OR FROM EXPO	ADVERTISING IN			MAG-NEWS ARTICLE	TV	RADIO	OTHER	TOTALS
								MAGAZINES	NEWSPAPERS	MAG-NEWS ARTICLE					
Michigan	Number Percent	56 26.29	51 23.94	1 .47	1 .47	7 3.29	10 4.69	26 12.21	7 3.29	1 .47	2 .94	—	50 23.47	100.00 100.00 %	
New York	Number Percent	33 24.63	31 23.13	1 .75	2 1.48	—	11 8.21	18 13.43	9 6.72	6 4.48	—	3 2.24	—	20 14.93	100.00 100.00 %
Ohio	Number Percent	45 44.55	17 16.83	2 1.98	—	1 .99	7 6.93	13 12.87	3 2.98	1 .99	.99 1.99	—	—	11 10.89	100.00 100.00 %
Pennsylvania	Number Percent	16 28.57	18 32.14	—	2 3.57	1 1.79	1 1.79	5 8.93	2 3.57	4 7.14	2 3.57	—	1 1.79	4 7.14	100.00 100.00 %
Illinois	Number Percent	13 25.00	5 9.62	—	1 1.92	1 1.92	—	—	21 40.38	2 3.85	—	—	—	9 17.31	100.00 100.00 %
Minnesota	Number Percent	12 30.00	6 15.00	—	—	—	1 2.50	1 2.50	9 22.50	1 2.50	—	—	—	10 25.00	100.00 100.00 %
New Jersey	Number Percent	6 28.57	4 19.05	—	—	—	—	3 14.29	1 4.76	2 9.52	—	—	1 4.76	4 19.05	100.00 100.00 %
Wisconsin	Number Percent	10 37.05	4 14.82	1 3.70	1 3.70	—	—	1 3.70	4 14.82	1 3.70	1 3.70	—	—	4 14.81	100.00 100.00 %
Massachusetts	Number Percent	1 7.14	4 28.57	1 7.14	1 7.14	—	—	2 14.29	2 14.29	1 7.14	—	—	—	2 14.29	100.00 100.00 %
Indiana	Number Percent	3 10.71	—	—	1 3.57	—	—	2 7.14	15 53.58	—	—	—	—	7 25.00	100.00 100.00 %
Other States	Number Percent	33 20.63	18 11.24	—	4 2.50	1 .63	7 4.37	60 37.50	5 3.13	1 .63	2 1.24	.63 1.24	1 .63	7 17.50	100.00 100.00 %
TOTALS	Number Percent	228 26.95	158 18.67	6 .71	13 1.54	12 1.42	45 5.32	174 20.57	33 3.90	14 1.65	6 .71	.7 .83	1 .12	149 17.61	846 100.00 %

TABLE XIV

HOW FIRST TIME VISITORS AND REPEAT VISITORS
BECAME INTERESTED IN ONTARIO

	FIRST TIME VISITORS	REPEAT VISITORS
Friends in U.S.	21.98 %	29.03 %
Friends in Ontario	9.22	23.30
Travel Agent	1.42	.36
Canadian Government Travel Bureau	1.77	1.43
Travelogues and Documentary Movies	2.13	1.08
Do not recall	3.55	6.27
En Route to or from Expo	42.91	9.50
Advertising in magazines	3.55	4.12
Advertising in newspapers	1.77	1.61
Magazine or newspaper articles	1.06	.54
T.V.	.71	.90
Radio	-	.18
Other	9.93	21.68
TOTALS	100.00 %	100.00 %

TABLE XV.

IN THE PAST SIX MONTHS OR SO
HAVE YOU NOTICED ANY ONTARIO TRAVEL ADVERTISING
IN MAGAZINES ?

	NUMBER	PERCENT
Yes	449	53.08
No	246	29.08
Don't Recall	120	14.18
Did Not Answer	31	3.66
TOTALS	846	100.00 %

TABLE XVI

MAGAZINES OR NEWSPAPERS IN WHICH ONTARIO ADVERTISING NOTICED
 (This question was directed only to those respondents who
 stated that they have noticed Ontario advertising)

MAGAZINE	NUMBER	PERCENT
<u>New Yorker</u>	32	6.78)
<u>Life</u>	124	26.27)
<u>Outdoor Life</u>	54	11.45) - 62.29 %
<u>Time</u>	50	10.59)
<u>National Geographic</u>	34	7.20)
Newspapers	52	11.02
Readers Digest	18	3.82
Look	16	3.41
Holiday	12	2.55
<u>Field & Stream</u>	12	2.55 - 2.55 %
McCalls	8	1.69
Home Journal	7	1.48
Post	5	1.07
Expo	5	1.07
Better Homes & Gardens	3	.64
Sunset	3	.64
True	2	.42
Male	2	.42
T.V.	2	.42
Redbook	2	.42
Fortune	2	.42
A.A.A.	2	.42
Teacher's Magazine	2	.42
Saturday Review	2	.42
Requested Brochures	2	.42
Canadian Representative	1	.21
Chatelaine	1	.21
National Observer	1	.21
McLeans	1	.21
Cosmopolitan	1	.21
Sports Illustrated	1	.21
Newsweek	1	.21
Playboy	1	.21
Popular Mechanics	1	.21
Argosy	1	.21
Centennial	1	.21
Family Herald	1	.21
Signs	1	.21
Aviation Magazine	1	.21
<u>Sports Field</u>	1	.21 - .21 %
More of Man	1	.21
Santiego	1	.21
Sports Afield	1	.21
Good Housekeeping	1	.21
<hr/>		
TOTALS	472	(1) 100.00 % (2) 65.05 %

NOTE:(1) 449 Respondents stated they noticed 472 ads in U.S. magazines and newspapers, showing some overlapping; 23 respondents reported noticing 2 separate ads.

(2) Ontario Department of Tourism and Information advertises in the magazines which are underlined. These represent 65.05% of advertising noticed.

TABLE XVII

MAGAZINES SUBSCRIBED TO BY RESPONDENTS

MAGAZINES	NUMBER OF RESPONDENTS	PERCENT	NUMBER OF MAGAZINES SUBSCRIBED TO	PERCENT
No Subscription	225	26.60 %	-	-
<u>One Magazine Only</u>				
-National Geographic	20			
-Life	26			
-Time	20			
-New Yorker	6			
-Reader's Digest	51			
-Look	13			
-Saturday Review	1			
-Saturday Evening Post	10			
-Sports Illustrated	20			
	167	19.74 %	167	11.42 %
<u>Two Magazines</u>				
-National Geographic/Reader's Digest	19			
-National Geographic/Time	5			
-National Geographic/New Yorker	4			
-National Geographic/Life	3			
-National Geographic/one other	12			
-Life/Reader's Digest	20			
-Life/Time	16			
-Life/one other	37			
-Time/Reader's Digest	15			
-Time/one other	18			
-New Yorker/Time	7			
-New Yorker/Life	4			
-New Yorker/Reader's Digest	2			
-New Yorker/one other	12			
-Reader's Digest/one other	30			
-Saturday Evening Post/one other	13			
-Sports Illustrated/one other	3			
	220	26.00 %	440	30.10 %
<u>Three Magazines</u>	134	15.84 %	402	27.50 %
<u>Four Magazines</u>	68	8.04 %	272	18.60 %
<u>Five Magazines</u>	16	1.89 %	80	5.46 %
<u>Six Magazines</u>	12	1.42 %	72	4.93 %
<u>Seven Magazines</u>	3	.35 %	21	1.44 %
<u>Eight Magazines</u>	1	.12 %	8	.55 %
GRAND TOTALS	846	100.00 %	1,462	100.00 %

TABLE XVIII

RESPONDENTS' AWARENESS OF <u>ONTARIO GOVERNMENT RECEPTION CENTRES</u>		
	<u>Number</u>	<u>Per cent</u>
Yes	629	74.35
No	164	19.39
Did not know	47	5.56
Did not reply	6	0.70
<u>Total</u>	846	100.00%

RESPONDENTS' AWARENESS OF
ONTARIO GOVERNMENT RECEPTION CENTRES
- BY STATE OF ORIGIN

STATE		YES	NO	DO NOT KNOW	DID NOT ANSWER	TOTALS
Michigan	Number Percent	173 81.22	26 12.21	13 6.10	1 .47	213 100.00 %
New York	Number Percent	100 72.99	30 21.90	7 5.11	- -	137 100.00 %
Ohio	Number Percent	76 74.51	16 15.69	9 8.82	1 .98	102 100.00 %
Pennsylvania	Number Percent	43 75.44	11 19.30	1 1.75	2 3.51	57 100.00 %
Illinois	Number Percent	41 77.36	9 16.98	2 3.77	1 1.89	53 100.00 %
Minnesota	Number Percent	30 75.00	6 15.00	4 10.00	- -	40 100.00 %
New Jersey	Number Percent	14 63.64	8 36.36	- -	- -	22 100.00 %
Wisconsin	Number Percent	19 70.37	6 22.22	2 7.41	- -	27 100.00 %
Massachusetts	Number Percent	11 78.57	3 21.43	- -	- -	14 100.00 %
Indiana	Number Percent	20 71.43	7 25.00	1 3.57	- -	28 100.00 %
Other States	Number Percent	102 66.67	42 27.45	8 5.23	1 .65	153 100.00 %
TOTALS	Number Percent	629 74.35	164 19.39	47 5.56	6 .70	846 100.00 %

TABLE XX

RESPONDENTS' USE OF ONTARIO GOVERNMENT

RECEPTION CENTRES - BY STATE OF ORIGIN

STATE		YES	NO	DO NOT RECALL	DID NOT ANSWER	TOTALS
Michigan	Number Percent	118 55.40	59 27.70	2 .94	34 15.96	213 100.00 %
New York	Number Percent	62 45.25	50 36.50	5 3.65	20 14.60	137 100.00 %
Ohio	Number Percent	56 54.90	23 22.55	3 2.94	20 19.61	102 100.00 %
Pennsylvania	Number Percent	28 49.12	19 33.34	1 1.75	9 15.79	57 100.00 %
Illinois	Number Percent	26 49.06	21 39.62	1 1.89	5 9.43	53 100.00 %
Minnesota	Number Percent	21 52.50	10 25.00	-	9 22.50	40 100.00 %
New Jersey	Number Percent	7 31.81	14 63.64	-	1 4.55	22 100.00 %
Wisconsin	Number Percent	13 48.15	8 29.63	-	6 22.22	27 100.00 %
Massachusetts	Number Percent	8 57.14	5 35.71	-	1 7.15	14 100.00 %
Indiana	Number Percent	19 67.86	3 10.71	-	6 21.43	28 100.00 %
Other States	Number Percent	67 43.79	54 35.30	1 .65	31 20.26	153 100.00 %
TOTALS	Number Percent	425 50.24	266 31.44	13 1.54	142 16.78	846 100.00 %

TABLE XXI

RESPONDENTS' USE OF ONTARIO GOVERNMENT RECEPTION CENTRES

- BY AREA OF DESTINATION IN ONTARIO

VACATION AREA		YES	NO	DO NOT RECALL	DID NOT ANSWER	TOTALS
Kent-Essex	Number	32	13	-	1	46
	Percent	69.57	28.26	-	2.17	100.00 %
Lambton-Sarnia	Number	4	2	-	3	9
	Percent	44.44	22.22	-	33.34	100.00 %
Central Erie	Number	5	2	-	2	9
	Percent	55.56	22.22	-	22.22	100.00 %
Mid-Western	Number	18	11	-	7	36
	Percent	50.00	30.56	-	19.44	100.00 %
Niagara-Iroquois	Number	52	50	-	13	115
	Percent	45.22	43.48	-	11.30	100.00 %
Metropolitan	Number	63	49	2	14	128
	Percent	49.22	38.28	1.56	10.94	100.00 %
Huronia-Lake Simcoe	Number	24	15	-	10	49
	Percent	48.98	30.61	-	20.41	100.00 %
Kawartha Lakes	Number	12	7	4	10	33
	Percent	36.36	21.22	12.12	30.30	100.00 %
Great Pine Ridge	Number	1	-	-	-	1
	Percent	100.00	-	-	-	100.00 %
Bay of Quinte	Number	13	13	1	5	32
	Percent	40.62	40.62	3.13	15.63	100.00 %
Hastings-Land O'Lakes	Number	28	9	2	7	46
	Percent	60.87	19.56	4.35	15.22	100.00 %
Rideau Lakes-1000 Is.	Number	5	3	1	1	10
	Percent	50.00	30.00	10.00	10.00	100.00 %
Seaway Valley	Number	11	13	-	10	34
	Percent	32.35	38.24	-	29.41	100.00 %
Lower Ottawa Valley	Number	37	10	-	13	60
	Percent	61.67	16.67	-	21.66	100.00 %
Upper Ottawa Valley	Number	-	1	-	-	1
	Percent	-	100.00	-	-	100.00 %
Madawaska Valley	Number	2	-	-	-	2
	Percent	100.00	-	-	-	100.00 %
Haliburton Highlands	Number	1	-	1	1	3
	Percent	33.34	-	33.33	33.33	100.00 %
Muskoka	Number	10	14	-	4	28
	Percent	35.71	50.00	-	14.29	100.00 %
Grey-Bruce	Number	2	7	1	1	11
	Percent	18.18	63.64	9.09	9.09	100.00 %
Parry-Georgian Bay	Number	2	1	-	4	7
	Percent	28.57	14.29	-	57.14	100.00 %

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next page

TABLE XXI (Continued)

Respondents' Use of Ontario Government Reception

Centres - By Area of Destination in Ontario

VACATION AREA		YES	NO	DO NOT RECALL	DID NOT ANSWER	TOTALS
Algonquin Park	Number Percent	2 28.57	2 28.57	-	3 42.86	7 100.00 %
Nipissing	Number Percent	4 50.00	1 12.50	-	3 37.50	8 100.00 %
Sudbury	Number Percent	14 48.28	8 27.58	-	7 24.14	29 100.00 %
Manitoulin	Number Percent	- -	- -	-	- -	- -
Algoma	Number Percent	34 70.83	12 25.00	-	2 4.17	48 100.00 %
Golden Route - 101	Number Percent	- -	- -	-	- -	- -
Timiskaming	Number Percent	- -	- -	-	- -	- -
James Bay Frontier	Number Percent	- -	- -	-	- -	- -
Upper Lake Superior	Number Percent	48 51.61	23 24.73	1 1.08	21 22.58	93 100.00 %
Rainy River	Number Percent	- -	- -	-	- -	- -
Lake of the Woods	Number Percent	1 100.00	- -	-	- -	1 100.00 %
Patricia	Number Percent	- -	- -	-	- -	- -
TOTALS	Number Percent	425 50.24	266 31.44	13 1.54	142 16.78	846 100.00 %

TABLE XXII

RESPONDENTS' INTENTION TO USE ONTARIO GOVERNMENT
RECEPTION CENTRES WHILE ON THIS TRIP

- BY STATE OF ORIGIN

STATE		YES	NO	NOT SURE	DID NOT ANSWER	TOTALS
Michigan	Number Percent	71 33.33	91 42.72	22 10.33	29 13.62	213 100.00 %
New York	Number Percent	45 32.85	53 38.69	22 16.05	17 12.41	137 100.00 %
Ohio	Number Percent	34 33.33	29 28.43	22 21.57	17 16.67	102 100.00 %
Pennsylvania	Number Percent	19 33.33	18 31.58	12 21.05	8 14.04	57 100.00 %
Illinois	Number Percent	24 45.28	15 28.30	10 18.87	4 7.55	53 100.00 %
Minnesota	Number Percent	19 47.50	6 15.00	11 27.50	4 10.00	40 100.00 %
New Jersey	Number Percent	7 31.82	12 54.55	2 9.08	1 4.55	22 100.00 %
Wisconsin	Number Percent	11 40.74	10 37.04	6 22.22	- -	27 100.00 %
Massachusetts	Number Percent	5 35.72	7 50.00	1 7.14	1 7.14	14 100.00 %
Indiana	Number Percent	15 53.57	4 14.29	2 7.14	7 25.00	28 100.00 %
Other States	Number Percent	63 41.18	31 20.26	24 15.68	35 22.88	153 100.00 %
TOTALS	Number Percent	313 37.00	276 32.62	134 15.84	123 14.54	846 100.00 %

TABLE XXIII

RESPONDENTS' INTENTION TO USE ONTARIO GOVERNMENT
RECEPTION CENTRES WHILE ON THIS TRIP -
BY DESTINATION IN ONTARIO

VACATION AREA		YES	NO	NOT SURE	DID NOT ANSWER	TOTALS
Kent-Essex	Number	13	28	3	2	46
	Percent	28.26	60.87	6.52	4.35	100.00 %
Lambton-Sarnia	Number	1	4	1	3	9
	Percent	11.11	44.44	11.11	33.34	100.00 %
Central Erie	Number	4	2	2	1	9
	Percent	44.45	22.22	22.22	11.11	100.00 %
Mid-Western	Number	6	22	2	6	36
	Percent	16.67	61.11	5.56	16.66	100.00 %
Niagara-Iroquois	Number	52	46	3	14	115
	Percent	45.22	40.00	2.61	12.17	100.00 %
Metropolitan	Number	60	44	10	14	128
	Percent	46.88	34.38	7.80	11.94	100.00 %
Huronia-Lake Simcoe	Number	24	15	9	1	49
	Percent	48.98	30.61	18.37	2.04	100.00 %
Kawartha Lakes	Number	3	14	8	8	33
	Percent	9.09	42.43	24.24	24.24	100.00 %
Great Pine Ridge	Number	1	-	-	-	1
	Percent	100.00	-	-	-	100.00 %
Bay of Quinte	Number	18	5	4	5	32
	Percent	56.25	15.62	12.50	15.63	100.00 %
Hastings-Land O'Lakes	Number	18	16	5	7	46
	Percent	39.13	34.78	10.87	15.22	100.00 %
Rideau Lakes-1000 Is.	Number	6	2	1	1	10
	Percent	60.00	20.00	10.00	10.00	100.00 %
Seaway Valley	Number	2	7	1	24	34
	Percent	5.88	20.59	2.94	70.59	100.00 %
Lower Ottawa Valley	Number	12	21	9	18	60
	Percent	20.00	35.00	15.00	30.00	100.00 %
Upper Ottawa Valley	Number	1	-	-	-	1
	Percent	100.00	-	-	-	100.00 %
Madawaska Valley	Number	-	1	1	-	2
	Percent	-	50.00	50.00	-	100.00 %
Haliburton Highlands	Number	-	1	1	1	3
	Percent	-	33.33	33.33	33.34	100.00 %
Muskoka	Number	10	10	7	1	28
	Percent	35.71	35.71	25.00	3.58	100.00 %
Grey-Bruce	Number	5	3	2	1	11
	Percent	45.45	27.27	18.19	9.09	100.00 %
Parry-Georgian Bay	Number	1	3	3	-	7
	Percent	14.28	42.86	42.86	-	100.00 %

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next page

TABLE XXIII (Continued)

**Respondents' Intention to Use Ontario Government
Reception Centres while on this Trip -
By Destination in Ontario**

VACATION AREA		YES	NO	NOT SURE	DID NOT ANSWER	TOTALS
Algonquin Park	Number	5	2	-	-	7
	Percent	71.43	28.57	-	-	100.00 %
Nipissing	Number	4	1	2	1	8
	Percent	50.00	12.50	25.00	12.50	100.00 %
Sudbury	Number	8	-	10	11	29
	Percent	27.59	-	34.48	37.93	100.00 %
Manitoulin	Number	-	-	-	-	-
	Percent	-	-	-	-	-
Algoma	Number	13	10	25	-	48
	Percent	27.08	20.84	52.08	-	100.00 %
Golden Route - 101	Number	-	-	-	-	-
	Percent	-	-	-	-	-
Timiskaming	Number	-	-	-	-	-
	Percent	-	-	-	-	-
James Bay Frontier	Number	-	-	-	-	-
	Percent	-	-	-	-	-
Upper Lake Superior	Number	45	19	25	4	93
	Percent	48.39	20.43	26.88	4.30	100.00 %
Rainy River	Number	-	-	-	-	-
	Percent	-	-	-	-	-
Lake of the Woods	Number	1	-	-	-	1
	Percent	100.00	-	-	-	100.00 %
Patricia	Number	-	-	-	-	-
	Percent	-	-	-	-	-
TOTALS	Number	313	276	134	123	846
	Percent	37.00	32.62	15.84	14.54	100.00 %

TABLE XXIV

Question 6(a)

SO FAR ON YOUR VISIT IN ONTARIO, WHAT DO YOU CONSIDER
THE MOST INTERESTING THINGS THAT YOU HAVE SEEN OR DONE?

	NUMBER	PERCENT
Historic Sites, Museums and Attractions	301	28.91
Niagara Falls and attractions	112	
Misc. attractions - mines, pulp mills, lumbercamps,		
Changing of guard at Ottawa	61	
Historic Sites and Museums	54	
Toronto attractions (City Hall, CNE, etc.)	54	
Centennial Caravan, Decora- tions, etc.	9	
Theatre (Stratford and Summer Theatres)	6	
Hamilton and attractions (Rock Gardens, etc.)	5	
Scenery (includes cleanliness and seeing wildlife)	177	17.00
Highways, Roads (includes traffic flow, improvements, etc.)	85	8.16
Hunting and/or Fishing	71	6.82
Have just arrived (nothing as yet)	70	6.72
Camping and favourable comments on Provincial Parks and Picnic areas	69	6.63
Boating (includes canoeing, cruises, interest in locks and canal systems)	27	2.59
Swimming-beaches. including those at Provincial Parks	25	2.40
En route (those passing through, and Expo visitors)	24	2.31
Farms (includes tobacco farms and market gardens)	22	2.11
Hospitality (friendliness of people in Ontario)	19	1.83
Accommodations, Restaurants (cleanliness, service, entertainment)	16	1.54
Sightseeing	15	1.44
Do not know	12	1.15
Visit to friends or relatives	10	.96
Industrial Growth (includes development in N. Ont., apartment developments, power development)	10	.96
None	9	.86
Everything	8	.77
Shopping (includes pottery and antiques)	7	.67
Other participating sports (golf, riding)	6	.58
Spectator Sports (Soccer, Lacrosse, Horse and Harness racing)	6	.58

(cont'd...../)

TABLE XXIV (Continued)

Question 6(a)

Government Reception Centres	6	.58
Hobbies (photographers , rock-hounds)	6	.58
Works here (or will be in future) and/or business	5	.48
Relaxation	3	.29
Owns Cottage	3	.29
Has lived here or attended school here	3	.29
Weather	3	.29
Honeymoon	2	.19
Did not state	21	2.02
TOTALS	1041*	100.00 %

*Exceeds actual number of respondents because more than one interest was expressed.

TABLE XXV

Question 6(b)

HAVE ANY ASPECTS OF THIS TRIP IN ONTARIO
BEEN SOMEWHAT DISAPPOINTING TO YOU?

	NUMBER	PERCENT
Nothing (or not much)	593	69.11
Highways, Roads (too slow signs, construction, 401, emergency aid)	55	6.41
Accommodations, Restaurants, Entertainment (lack of facilities, rates, poor service)	34	3.96
Just arrived (nothing as yet)	21	2.45
Camping (includes Provincial Parks, trailer parks)	17	1.98
Fishing (and guides)	16	1.86
Prices (in general)	14	1.63
Weather (either too cold or not cold enough for winter sport)	13	1.52
Beaches and water pollution	11	1.28
Historic Sites and attractions disappointing	10	1.17
Gas Prices and/or service at garages	9	1.05
Liquor regulations and other laws and restrictions	8	.93
Scenery disappointing	7	.82
Lack of Hospitality (and racial discrimination)	5	.58
Lack of Tourist Information	4	.47
Rate of Exchange	2	.23
Customs (officials)	2	.23
Lack of facilities at Information Centre	1	.12
Refused to State	1	.12
Did not State	35	4.08
TOTALS	858*	100.00 %

*Exceeds actual number of respondents because (in some cases)
more than one aspect was disappointing.

TABLE XXVI

WOULD YOU RECOMMEND ONTARIO TO FRIENDS?

	NUMBER	PERCENT
Yes	760	89.84
No	2	.24
Don't Know	49	5.79)
Other	9	1.06) 9.92
Did Not Answer	26	3.07)
TOTALS	846	100.00 %

TABLE XXVII

HOW LIKELY ARE YOU TO REVISIT ONTARIO?

	NUMBER	PERCENT
Very Likely	517	61.11
Quite Likely	234	27.66
Not Too Likely	73	8.63
Not Likely	5	.59
Did Not Answer	17	2.01
TOTALS	846	100.00 %

TABLE XXVIII

RELATION BETWEEN INTENTION TO REVISIT ONTARIO AND
INTENTION TO RECOMMEND ONTARIO FOR A TRIP OR VACATION

		HOW LIKELY ARE YOU TO REVISIT ONTARIO?					
		VERY LIKELY	QUITE LIKELY	NOT TOO LIKELY	NOT LIKELY	DID NOT STATE	TOTALS
WOULD YOU BE INCLINED TO RECOMMEND ONTARIO FOR A TRIP OR VACATION TO YOUR NEIGHBOURS AND FRIENDS?							
Yes	Number Percent	486 57.45	205 24.23	59 6.98	4 .47	6 .71	760 89.84 %
No	Number Percent	- -	- -	2 .24	- -	- -	2 .24 %
Do Not Know	Number Percent	10 1.18	25 2.96	10 1.18	1 .12	3 .35	49 5.79 %
Other	Number Percent	6 .71	1 .12	2 .23	- -	- -	9 1.06 %
Did Not State	Number Percent	15 1.77	3 .35	- -	- -	.95 8	26 3.07 %
TOTALS	Number Percent	517 61.11	234 27.66	73 8.63	5 .59	17 2.01	846 100.00 %

TABLE XXIX

INTENTION TO RECOMMEND ONTARIO TO FRIENDS AND RELATIVES
BY FIRST-TIME VISITORS AND BY REPEAT-VISITORS

INTENTION TO RECOMMEND	FIRST TIME	REPEAT
	VISITOR IN	VISITOR PERCENT
Yes	82.27	93.73
No	.35	.18
Don't Know	11.35	3.05
Other	.71	1.07
Did Not Answer	5.32	1.97
TOTALS	100.00 %	100.00 %

TABLE XXX

INTENTION TO REVISIT ONTARIO - BY FIRST-TIME
VISITORS, AND BY REPEAT-VISITORS

	<u>In per cent of Respondents</u>	
	<u>First-Time Visitors</u>	<u>Repeat- Visitors</u>
Very likely	33.69)) 74.47%	75.09)) 95.98%
Quite likely	40.78	20.78
Not too likely	20.21	2.87
Not likely	1.06	0.36
Did not reply	4.26	0.90
<u>Total</u>	100.00%	100.00%

TABLE XXXL.

RELATION BETWEEN INTENTION TO REVISIT ONTARIO AND
INTENTION TO RECOMMEND ONTARIO FOR A TRIP OR VACATION
BY FIRST TIME VISITORS AND REPEAT VISITORS

		How Likely Are You to Revisit Ontario?						
		Very Likely	Quite Likely	Not Too Likely	Not Likely	Did Not State	Totals	
Would You be Inclined to Recommend Ontario for a Trip or Vacation to Your Neighbours and Friends	Yes	29.79 71.69	34.04 18.99	15.96 2.51	1.06 .18	1.42 .36	82.27 % 93.73 %	
	No	-	-	.35 .18	-	-	.35 % .18 %	
First Visit Repeat Visit	First Visit	-	-	-	-	-		
	Repeat Visit	-	-	-	-	-		
Do Not Know	First Visit	1.06	6.03	3.19	-.18	1.07	11.35 % 3.05 %	
	Repeat Visit	1.26	1.43	.18	-	-		
Other	First Visit	-	-.18	.71	-	-	.71 % 1.07 %	
	Repeat Visit	.89	-	-	-	-		
Did Not State	First Visit	2.84	.71	-	-	1.77	5.32 % 1.97 %	
	Repeat Visit	1.25	.18	-	-	.54		
TOTALS		33.69 75.09	40.78 20.78	20.21 2.87	1.06 .36	4.26 .90	100.00 % 100.00 %	

Question 7 (b): HOW LIKELY WOULD YOU BE TO REVISIT ONTARIO? WOULD YOU SAY THAT YOU ARE: (a) Very likely,
 (b) Quite likely, etc.

Question 7 (c) WHY DO YOU SAY THIS?

REASON FOR REPLY TO 7 (b)	REPLY TO 7 (b)				TOTAL NUMBER	TOTAL PERCENT
	A VERY LIKELY	B QUITE LIKELY	C NOT TOO LIKELY	D NOT AT ALL LIKELY		
Enjoyed this or previous trips and plan to return for vacation in Ontario	121	17	1		139	15.39
Desire to see more of Ontario or revisit a specific area	51	48	1	1	101	11.19
Visiting friends or relatives (or influenced by them)	78	21			99	10.97
Fishing and/or Hunting	59	27	1		87	9.64
Likes Ontario (attractions, scenery, people, etc.) and would like to return	47	25	2		74	8.20
Too Far (or does not have time)	2	27	3	2	34	3.77
Owes Cottage, farm, or lives in Ontario	28	2			30	3.32
Hospitality	16	13			29	3.21
Camping (Provincial Parks and trailering)	22	6			28	3.10
Attracted by Scenery	18	7			25	2.77
Wish to visit places <u>other than</u> Ontario			17		18	1.99
Proximity	12	3			15	1.66
En route to destination other than in Ontario	7	4			14	1.55
Undecided (or if in area)	2	3			4	1.55
Work or Business in Ontario	8	5			13	1.44

TABLE XXXII (Continued)

Climate pleasant, fresh, relaxing	7	11	.22
Like to Travel	5	10	.11
Likes to get out of U.S. (or a change)	6	9	1.00
Expressed desire to come back to live in Ontario	4	7	.78
Highways	2	3	
Skiing	4	6	.67
Beaches (including those at Provincial Parks)	6	6	.67
Less Commercialism	3	2	
Too old to travel	5	5	.55
Previously Canadian	4	5	.55
Boating and Waterways	2	3	.55
Uncrowded Vacation regions (and cities)	2	2	.44
Does not plan ahead	3	3	.33
Not impressed so far, or disliked Ontario	2	2	.33
Shopping	3	3	.33
Spectator Sports (Horse racing, Hockey, Car racing)	3	3	.33
Shows (includes Stratford) and entertainment	3	3	.33
Circle Tours	1	1	.22
Just arrived	1	2	.22
Pursuing Hobbies	1	2	.22

(cont'd on next page.....)

REPLY TO 7 (b)

REASON FOR REPLY TO 7 (b)	REPLY TO 7 (b)				TOTAL NUMBER	TOTAL PERCENT
	A VERY LIKELY	B QUITE LIKELY	C NOT TOO LIKELY	D NOT AT ALL LIKELY	DID NOT STATE A, B, C, D	
Accommodations	2				2	.22
Historical Sites		2			2	.22
Educational Aspects		2			2	.22
Dislikes traffic			1		1	.11
Climate (adverse)			1		1	.11
Would come for major attraction			1		1	.11
Holiday less expensive in Ontario			1		1	.11
Lack of Hospitality			1		1	.11
Have small children			1		1	.11
To see more centennial events			1		1	.11
No reason			3		3	.33
Did Not State	30	26	2	9	67	7.42
TOTALS	564	244	73	5	903*	
PERCENTS	62.46 %	27.02 %	8.09 %	0.55 %	1.88 %	100.00 %

*Exceeds actual number of respondents because more than one reason stated.

TABLE XXXII

TYPE OF OVERNIGHT ACCOMMODATION USED

TYPE OF ACCOMMODATION	NUMBER	PERCENT
Motels	375	44.33)
Hotels	22	2.60) <u>46.93%</u>
Tourist Cabins	31	3.66)
Rented Cottage	62	7.33) <u>14.77%</u>
Own Cottage	32	3.78)
Camping Sites	138	16.31)
Trailer Camps	68	8.04) <u>24.35%</u>
Tourist Homes	9	1.06
Friends-Relatives	57	6.74
Other	39	4.61
Did Not State	13	1.54
TOTALS	846	100.00 %

TABLE XXXIV

PROBLEM IN SECURING DESIRED

<u>TYPE OF ACCOMMODATION?</u>		<u>Number</u>	<u>Per cent</u>
(A) No problem		640	75.65
(B) No problem, just arrived in Ontario		128	15.13
(C) Yes, some difficulty		34	4.02
(D) Did not reply		44	5.20
<u>Total</u>		846	100.00%

TABLE NO. XXXV

AVERAGE LENGTH OF STAY IN ONTARIO BY ORIGIN

STATE	AVERAGE
Michigan	4.8 Days
New York	4.9
Ohio	5.6
Pennsylvania	6.6
Illinois	4.9
Minnesota	4.9
New Jersey	4.7
Wisconsin	4.4
Massachusetts	4.5
Indiana	4.4
Other States	4.4
AVERAGE OF ALL STATES	4.9 Days

TABLE XXXVI

AVERAGE LENGTH OF STAY IN ONTARIO BY DESTINATION

VACATION AREA	AVERAGE LENGTH OF STAY
Kent-Essex	5.6 days
Lambton-Sarnia	3.8
Central Erie	5.4
Mid-Western	4.0
Niagara-Iroquois	3.2
Metropolitan	4.0
Huronia-Lake Simcoe	6.5
Kawartha Lakes	7.8
Great Pine Ridge	7.0
Bay of Quinte	3.8
Hastings-Land O'Lakes	4.6
Rideau Lakes-1000 Islands	3.3
Seaway Valley	3.5
Lower Ottawa Valley	6.4
Upper Ottawa Valley	7.0
Madawaska Valley	8.5
Haliburton Highlands	10.0
Muskoka	7.5
Grey-Bruce	4.6
Parry-Georgian Bay	7.2
Algonquin Park	8.7
Nipissing	6.0
Sudbury	4.2
Manitoulin	-
Algoma	5.7
Golden Route - 101	-
Timiskaming	-
James Bay Frontier	-
Upper Lake Superior	5.4
Rainy River	-
Lake of the Woods	7.0
Patricia	-
AVERAGE LENGTH OF STAY OF ALL AREAS	4.9 Days

TABLE XXXVII

AGE OF RESPONDENTS

AGE GROUPS	NUMBER	PERCENT
Under 20 Years	18	2.13
21 - 30	129	15.25
31 - 40	245	28.96
41 - 50	222	26.24
51 - 60	132	15.60
61 - 70	68	8.04
Did not state	32	3.78
TOTAL	846	100.00 %

Average Age - 41.3 Years

TABLE XXXVII

RESPONDENT'S INCOME

INCOME GROUPS	NUMBER	IN PERCENT
\$ 0 - \$ 6,000	44	7.07
\$ 6,001 - \$ 8,000	108	17.36
\$ 8,001 - \$10,000	207	33.28
\$10,001 - \$15,000	151	24.28
\$15,001 and over	73	11.74
Did not State	39	6.27
TOTAL	622*	100.00 %

Average Income per Respondent - \$ 10,210.00

*Note: 224 Respondents did not report their income.

TABLE XXXIX

MODEL YEAR OF AUTOMOBILE

YEAR	NUMBER	PERCENT
1967	176	22.34)
1966	222	28.17) 68.53%
1965	142	18.02)
1964	90	11.42
1963	56	7.11
1962	48	6.09
1961	21	2.66
1960 and Under	33	4.19
TOTALS	788 *	100.00 %

Average Age of the Car - 2.2 Years

* Note: 58 Respondents did not state the model year of their car.

TABLE XL

OCCUPATION OF RESPONDENTS

TYPE OF OCCUPATION	NUMBER	PERCENT
Professional	241	28.48
Owner or Manager	97	11.47
Sales	76	8.98
Skilled Labour	215	25.41
Unskilled Labour	13	1.54
Farmer	29	3.43
Retired	66	7.80
Housekeeper	18	2.13
Student	25	2.96
Other	28	3.31
Did Not State	38	4.49
TOTAL	846	100.00 %

TABLE XLI

ORIGIN OF U.S. VISITORS
COMPARED WITH DOMINION BUREAU OF STATISTICS' DATA

<u>State</u>	<u>Number</u>	<u>Percent</u>	D.B.S.(i) Percent
Michigan	163	26.21%	30.07%
New York	100	16.08	26.18
Ohio	68	10.93	11.01
Pennsylvania	44	7.07	7.01
Illinois	43	6.91	4.41
Minnesota	29	4.66	3.03
Indiana	20	3.22	2.07
New Jersey	19	3.05	2.66
Wisconsin	19	3.05	2.33
Massachusetts	13	2.09	1.51
Iowa	9	1.45	1.04
Maryland	9	1.45	.76
Florida	8	1.29	1.04
California	7	1.13	.92
Virginia	7	1.13	.52
South Carolina	7	1.13	.06
Texas	6	.96	.28
Missouri	4	.64	.43
Kansas	4	.64	.21
Nebraska	3	.48	.18
Kentucky	2	.32	.27
New Hampshire	2	.32	.17
Other States	36	5.79	3.84
TOTAL	622⁽ⁱⁱ⁾	100.00%	100.00%

(i) Source - Dominion Bureau of Statistics - Passenger Cars Visiting Ontario on Customs permits for 2 or more

Nights from the U.S. during 1965.

(ii) Note - Only 622 out of 846 respondents reported their origin by State. In some instances the origin was reported, but incorrectly.

TABLE XLII

NUMBER OF RESPONDENTS IN PROFESSIONAL OCCUPATIONS
BY ANNUAL INCOME GROUP

ANNUAL INCOME	NUMBER	IN PERCENT
\$ 0 - \$ 6,000	5	2.08
\$ 6,001 - \$ 8,000	29	12.03
\$ 8,001 - \$10,000	60	24.90
\$10,001 - \$15,000	82	34.02
\$15,001 and over	52	21.58
Did Not State	13	5.39
TOTALS	241	100.00 %

Average Annual Income for Professional Respondents - \$11,925.00

Average Annual Income for All Respondents - \$10,210.00

TABLE XLIII

RESPONDENTS IN PROFESSIONAL OCCUPATIONS -
AVERAGE ANNUAL INCOME BY AGE GROUPS

AGE GROUPS	AVERAGE ANNUAL INCOME
Under 20	\$ 8,000.00
21 - 30	10,286.00
31 - 40	11,462.00
41 - 50	12,803.00
51 - 60	13,597.00
61 - 70	13,364.00
AVERAGE ANNUAL INCOME ALL AGE GROUPS	\$ 11,925.00

Average Age for Professionals 40.1 years

Average Age for All Respondents 41.3 years

TABLE XLIV

RESPONDENTS IN PROFESSIONAL OCCUPATIONS -
AVERAGE ANNUAL INCOME BY LENGTH OF STAY

LENGTH OF STAY	NUMBER	PERCENT	AVERAGE ANNUAL INCOME
Less than 1 day	15	6.58	\$ 11,300.00
1 day only	6	2.63	12,500.00
1 - 2 days	28	12.28	11,964.00
2 - 3 days	53	23.25	11,226.00
1 week	53	23.25	11,160.00
2 weeks	34	14.91	12,956.00
Other	39	17.10	13,141.00
TOTALS		100.00 %	\$ 11,925.00

Average Length of Stay for Professionals 5.6 days

Average Length of Stay for All Respondents 4.9 days

TABLE XLV

COMPARISON OF U.S. VISITOR-RESPONDENTS' INTENTION TO RECOMMEND
ONTARIO VISIT TO OTHERS, BY THOSE IN PROFESSIONAL OCCUPATIONS,
AND BY THOSE IN NON-PROFESSIONAL OCCUPATIONS.

Intention to Recommend Ontario Visit to others	U.S. VISITOR-RESPONDENTS	
	In Professional Occupations (In Percent)	In Non-Professional Occupations (In Percent)
Yes	91.70	88.94
No	-	.33
Do not know	4.98	6.11
Other	1.25	.99
Did not state	2.07	3.63
TOTALS	100.00 %	100.00 %

TABLE XLVI

COMPARISON OF U.S. VISITOR-RESPONDENTS' INTENTION
TO REVISIT ONTARIO, BY THOSE
IN PROFESSIONAL OCCUPATIONS, AND BY THOSE
IN NON-PROFESSIONAL OCCUPATIONS

Intention to Revisit Ontario	U.S. VISITOR-RESPONDENTS	
	In Professional Occupations (In Per cent)	In Non-Professional Occupations (In Per cent)
Very Likely	63.90	59.90
Quite Likely	26.56	28.05
Not too Likely	7.47	9.08
Not at all Likely	.83	.50
Did not State	1.24	2.47
TOTALS	100.00 %	100.00 %

TABLE XLVII

COMPARISON OF TYPE OF ACCOMMODATION USED IN ONTARIO
BY U.S. VISITOR-RESPONDENTS IN PROFESSIONAL OCCUPATIONS,
AND BY THOSE IN NON-PROFESSIONAL OCCUPATIONS

Type of Accommodation Used	U.S. VISITOR-RESPONDENTS	
	In Professional Occupations (In Percent)	In Non-Professional Occupations (In Percent)
Motels	(47.72	43.77)
Hotels	50.63% (2.91	2.53) 46.30%
Tourist Cabins	(1.66	4.55)
Rented Cottage	8.71% (3.73	8.92) 17.51%
Own Cottage	(3.32	4.04)
Camping Site	(17.43	16.16)
Trailer Camps	21.58% (4.15	9.76) 25.92%
Tourist Homes	1.66	.84
Friends and Relatives	10.37	5.39
Other	7.05	4.04
TOTAL	100.00 %	100.00 %

TABLE XLVIII

RESPONDENTS IN PROFESSIONAL OCCUPATIONS -
AVERAGE ANNUAL INCOME BY ORIGIN

STATE	NUMBER	PERCENT	AVERAGE ANNUAL INCOME
Michigan	50	21.93	\$ 11,980.00
New York	46	20.18	11,337.00
Ohio	19	8.33	12,132.00
Pennsylvania	11	4.82	11,864.00
Illinois	17	7.46	12,765.00
Minnesota	7	3.07	10,214.00
New Jersey	8	3.51	12,313.00
Wisconsin	7	3.07	11,500.00
Massachusetts	8	3.51	9,938.00
Indiana	6	2.63	13,167.00
Other States	49	21.49	12,480.00
TOTALS		100.00 %	\$ 11,925.00

A P P E N D I C E S

GAS STATION SURVEY

Hello, my name is.....of..... We are conducting a short study on travel, and would appreciate a few minutes of your time.

1. (a) Is this your first visit to Ontario? A() Yes B() No

(b) IF "NO" ASK: How many times have you visited Ontario in the past 5 years?
 A() 2-3 B() 4-5 C() 6-7 D() 8-9 E() 10 and over

F() Other, specify _____

(c) IF FIRST VISIT ASK: So far, has Ontario and its attractions lived up to your expectations? A() Yes B() No C() Don't know

(d) IF "NO" OR "DON'T KNOW" ASK: Why do you say that? _____

2. How did you first become interested in visiting Ontario? (DO NOT READ LIST)

A() Recommended by friends,	E() Travalogues or relatives in U.S.	H() Advertising in Documentary movies	Magazine
B() Friends, relatives in Ontario.	F() Don't recall	I() Advertising in Newspaper	
C() Travel Agent	G() On way to/from Expo.	J() Magazine/Newspaper articles(specify)	
D() Canadian Travel Bureau			
K() Television	L() Radio	M() Other, specify	

3. (a) In the past six months or so, have you noticed any Ontario travel advertising in magazines? A() Yes B() No C() Don't recall

(b) IF "YES": Which magazines? (DO NOT READ LIST).

A() New Yorker	D() Time
B() Life	E() National Geographic
C() Outdoor Life	F() Other, specify

4. (a) Do you subscribe to or regularly buy any of the following magazines? (ROTATE ORDER OF READING)

	Buy	Subscribe	Regularly	Neither
1. National Geographic	A()	B()	C()	
2. New Yorker	A()	B()	C()	
3. Life	A()	B()	C()	
4. Time	A()	B()	C()	
5. Reader's Digest	A()	B()	C()	
6. Saturday Evening Post	A()	B()	C()	
7. Sports Illustrated	A()	B()	C()	
8. Look	A()	B()	C()	
9. Saturday Review	A()	B()	C()	

5. (a) Do you happen to know if the Ontario Government maintains reception centres to assist visitors such as yourself?

A() Yes B() No C() Don't know

(b) IF "YES" ASK: Have you ever made use of these reception centres?
 A() Yes B() No C() Don't recall

(c) Do you think that you will use these reception centres on this visit?
 A() Yes B() No C() Not sure

6. (a) So far on your visit, in Ontario what do you consider to be the most interesting things that you have seen or done?

(b) Have any aspects of this trip in Ontario been somewhat disappointing to you?

7. (a) From your experiences in the Province to date, would you be inclined or not inclined to recommend Ontario for a trip or vacation to your neighbours and friends? A()Yes B()No C()Don't know D()Other,

(b) How likely would you be to revisit Ontario? Would you say that you are...?
A()Very Likely B()Quite likely C()Not too likely
D()Not at all likely

(c) Why do you say this? _____

8. (a) On this visit, what type of overnight accommodation have you used or intend to use?

A()Motels D()Hotels G()Rented Cottage
B()Tourist Cabins E()Tourist Homes H()Trailer Camps
C()Camping Sites F()Friends, Relatives I()Own Cottage
J()Other, specify _____

(b) Have you encountered any major problems in securing this type of accommodation?
A()No B()No, just arrived in Ontario C()Yes, specify _____

(c) Incidentally, how long will your stay be in Ontario?

A()Less than 1 day D()2 to 3 days
B()1 day only E()1 week
C()1 to 2 days F()2 weeks
G()Other, specify _____

BASIC DATA:

9. (a) Respondent's sex: A()Male B()Female

(b) Respondent's age: A() Under 20 E() 51-60
B() 21-30 F() 61-70
C() 31-40 G() Did not state
D() 41-50

10. Occupation of Head of Household

A() Professional F() Unskilled Labour K() Student
B() Owner or Manager G() Farmer L() Other
C() Sales H() Retired M() Did not state
D() Clerical/Office I() Armed Forces/Police
E() Skilled Labour J() Housekeeper

11. (a) Respondent's Home Town/City _____ () (b) State _____ ()

12. Model Year of Car: _____

13. Number of passenger cars operated by household members: A() One D() Four
B() Two E() More than
C() Three Four

14. In which income group are you situated?

0 - \$ 6,000 _____
\$ 6,001 - 8,000 _____
8,001 - 10,000 _____
10,001 - 15,000 _____
15,000 and over _____

15. Date of Interview: _____

16. Number: _____

17. Location: _____

18. Interviewer's Signature: _____

TABLE "A"

**FACTORS INFLUENCING U.S. RESPONDENTS TO VISIT ONTARIO - AS DISCLOSED
BY RECENT ONTARIO DEPARTMENT OF TOURISM AND INFORMATION STUDIES**

APPENDIX II

Influences	U.S. Tourist Survey, Conducted by Person- nel Research Branch, Dept. of Civil Service, 1966 (See p. I ₄)	Gas Station Survey, 1967 (See Table V)	Analysis of U.S. Visitor Prospects to Ontario, 1967	U.S. Visitor Study, Conducted by McDonald Research Ltd., 1966
	100%	100%	100%	100%
Friends or relatives	46.5	(1)	36.9 (1)	27.2 (1)
Articles in magazines or newspapers	6.5	(3)	16.7 (2)	3.9 (3)
Advertisements in magazines or newspapers	5.0	7.0	23.7 (2)	5.1 > 9.0 (3)
Travel Bureau	2.5	9.4	N/A	-
Government Pamphlets	N/A	N/A	10.6 (4)	5.2 (1)
Television	1.3	3.8	N/A	23.9 (2)
Movies	1.2	2.1	N/A	3.8 (3)
Radio	0.5	1.4	N/A	2.4 (2)
Do not remember	10.0	3.5	N/A	-
Other	26.5	17.8 (3)	26.0 (3)	3.1 (2)
Did not state	-	1.4	N/A	-
Previous trips	-	-	27.2 (2)	-
Total	100%	100%	100%	100%

Note: Order of Magnitude = (1), (2), (3) and (4)

APPENDIX III

SUMMARY OF TOURIST ESTABLISHMENT OCCUPANCY
BY SELECTED DISTRICT AND TYPE OF ESTABLISHMENT
IN PERCENT - JULY 1967

ICT	VACATION AREAS	# RESPONSE	TOTAL	HOTEL		HOTEL (NOT LLB)	HOTEL			COTTAGE	CABIN	CAMP SITE	OTHER
				MOTOR	HOTEL LLB		MOTEL	LODGE					
	(1) Kent-Essex	82											
	(2) Lambton-Sarnia	94											
	(3) Central Erie	59											
	(4) Mid-Western	85	65	61	49	73	34	69	28	76	45		
	(19) Grey-Bruce	78	59	36	59	67	66	69	71	14	17		
	(5) Niagara Iroquois	69	70	72	n/a	69	52	85	52	78	66		
	(6) Metropolitan	64											
	(9) Great Pine Ridge	68	75	75	58	70	-	100	55	70	12		
	(7) Huronia-Lake Simcoe	52											
	(18) Muskoka	89	62	56	n/a	91	64	67	36	10	62		
	(8) Kawartha Lakes	63											
	(17) Haliburton	93	64	73	29	67	49	75	46	93	9		
	(10) Bay of Quinte	81											
	(11) Hastings Land O'Lakes	71											
	(12) Rideau Lakes-1000 Islands	65											
	(13) Seaway Valley	79	67	73	50	74	43	70	65	60	79		
	(14) Lower Ottawa Valley	83											
	(15) Upper Ottawa Valley	79											
	(16) Madawaska Valley	79	58	65	89	78	80	66	57	20	79		
	(20) Parry Sound-Georgian Bay	63											
	(21) Algonquin Park	-											
	(22) Nipissing	88											
	(23) Sudbury	58											
	(24) Manitoulin	71											
	(25) Algoma	64											
	(26) Golden Route - 101	89											
	(27) Timiskaming	67											
	(28) James Bay Frontier	-	70	67	7	77	76	78	80	25	29		
	(29) Upper Lake Superior	80											
	(30) Rainy River	58											
	(31) Lake of the Woods	84											
	(32) Patricia	89	62	66	67	81	35	78	70	43	40		
	AVERAGE TOTAL OCCUPANCY - 1967			66	68	54	75	56	74	52	41	(1)	56
	AVERAGE TOTAL OCCUPANCY - 1966			69	63	-	76	61	76	53	61		59

NOTE: 1967 Sample:

957 Establishments selected in Sample
699 Correct responses and tabulated
736 Correct responses in percent of selected sample

1966 Sample:

770 Establishments selected for Sample
529 Correct responses received
69% Correct responses, in percent of total sample

(1) NOTE:

Sample Returns on Campsites were not satisfactory
and the figures shown are not representative.

3 1761 11546884 5

